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: PLA@George H Fisher School 93

Charter School Address: 7151 E 35th St, Indianapolis, IN, 46226

Designated Representative and Contact Information (Phone & Email): Johnny Jin, Chief Strategy & Development Officer (818) 825-4407 jjin@phalenacademies.org

Mission Statement: Our mission is to ensure that each of our scholars meet high academic and social standards, and thrive as leaders at home, in their communities, and in the world.

School Leader/Principal: Jeff Hendricks

Current Board of Directors	
Marlin Jackson	Earl Martin Phalen
Fernando Reimers	Kristopher Kingery
James Phalen	

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):

Exhibit A

Application Checklist - Renewal				
#	Document	Page Limit	Format	Completed
	Renewal Proposal Overview	Use Template in Exhibit B	PDF	
	Renewal Application	30	MS Word or PDF	
1	Budget and Staffing Workbook	Template	MS Excel	
2	Budget Narrative	5 pages	MS Word or PDF	
3	Statement of Assurances (only one form required)	Use Template in Exhibit C	PDF	
4	Entire Application (including Exhibits)		PDF	

PLA@93 Charter Renewal Application Narrative

SECTION I: PERFORMANCE REVIEW

1. **Specifically address all measures in the Performance Dashboard Summary in which the school received a rating of "Approaches Standard," "Improvement Necessary," or "Does Not Meet Standard' focusing primarily, but not exclusively, on the school's most recently completed school year. Responses can include a root cause analysis, actions the school has taken to address deficiencies, supplemental or contextual information to augment the school's record, or a timeline as to when the school expects to "meet standard."**

We are honored to partner with the Indiana Charter School Board in service of our scholars. Over the past ten years, our partnership has allowed children in Indianapolis to receive a high-quality public education in a safe and nurturing setting. We want to start by expressing our gratitude for your partnership, as it means so much for the children and families we serve. Phalen Leadership Academy at George H. Fisher School 93 (PLA@93) is located within a historically underserved and economically distressed neighborhood in Indianapolis. Schoolwide, 92% of our scholars are Black and Latino; 78% are living in poverty, and all students are eligible for free meals. In addition to the incredible challenges that our scholars already face in their daily lives, COVID created even more stress and disruption. At PLA@93, we are proud to serve our scholars and families, and our staff work hard each day to provide a high quality and well-rounded educational home to help our scholars realize their tremendous innate potential. Below please find our analysis of PLA@93's performance across Academic Achievement, Financial Health, and Organizational Compliance.

A. Academic Achievement

By implementing the evidence-based PLA model, PLA@93 has made significant strides towards improving scholar achievement. Data from the 2022-2023 school year shows that our scholars have grown academically, even as schools across the country are still dealing with learning loss caused by the pandemic. According to the ICSB Accountability Dashboard, our school "Exceeds Standard" on the School Total Performance Measures for "1.4.b. Grade level proficiency on the state assessment in Math compared with the previous school year;" and "1.4.d. Grade level proficiency on the state assessment in Math compared with traditional school corporations." In addition to the overall growth in math achievement, our school created strong growth across traditionally underserved student groups as well. For performance measure "1.6.d the change in proficiency on the state assessment in Math for each subgroup compared with the previous school year," PLA@93 "Meets or Exceeds Standard" for Black, Multiracial, Low-Income (Free/Reduced Price Meals), General Education, and ELL Scholars. Similarly, for performance measure "1.6.b Proficiency on the state assessment in Math for each subgroup compared with traditional school corporation," PLA@93 "Meets or Exceeds Standards" for Black, Hispanic, Multiracial, Low-Income (Free/Reduced Price Meals) and General Education scholars. These data points reflect the impact of our evidence-based educational model, which leverages personalized, small-group learning and a robust school culture that recognizes student progress to cultivate a growth mindset in our scholars.

While our school has experienced strong growth in math, we are working to improve ELA performance, as we continue to address significant learning loss caused by the pandemic. For performance measure "1.4.a Grade level proficiency on the state assessment in English Language

Arts compared with the previous school year," PLA@93 "Approaches Standard" for grades 3 and 6; and "Does Not Meet Standard" for grades 4 and 5. Similarly, the school "Does Not Meet Standard" for performance measure "1.4.c Grade-level proficiency on the state ELA assessment, as compared with traditional school corporation." Going forward, we aim to bolster ILEARN proficiency rates by deepening the integration of small-group learning and support in our daily schedule. Our approach must also take into account the larger environment in which we work. The community PLA@93 serves, the Far Eastside of Indianapolis, is one of the most impoverished communities in the state and country. We recognize that our student population is highly transient, making sustained progress very challenging. We have already started to implement several retention strategies aimed at increasing stability and support.

Continuous improvement is a core value for our work. A key driver for continuous improvement is implementation fidelity. Moving forward, we want to ensure that we further strengthen the implementation of the evidence-based PLA model which has enabled our scholars to improve their academic progress. The following chart outlines key performance domains and strategies for improvement.

Key Performance Domains	Key Observations	Strategies for Improvement
Scholar Attendance According to the dashboard, scholars maintained an 87.65% attendance rate in the 2022-23 school year whereas in the initial years the attendance rate was 96.50%.	According to the ICSB performance dashboard, in 2022-23, PLA@93 "did not meet standard" with an attendance rate of 87.65%. Through our internal audit, we found that our attendance rate for SY 22-23 was 95%. We plan to address this data discrepancy by improving the fidelity of our reporting process to the IDOE. Furthermore, enrollment for SY 23-24 has increased to 415 scholars, which reflects our strong efforts in building a positive school climate and culture. Student attendance is very important to us, and we will continue to sustain our school culture and student engagement.	- Hired a Social Worker to oversee attendance tracking software (PowerSchool) and run quality checks to ensure accurate reporting - Continue to encourage teacher attendance and retention to provide educational stability - Positive incentives to reward students for good attendance - Provide teacher incentives for good attendance - Provide teacher retention stipends to high quality teachers - Community outreach and parent engagement events once per month - Maintaining strong school culture through community events, progress feedback cycles, and positive behavioral interventions and supports

ELA Proficiency According to the dashboard, 9.68% tested proficient in English Language Arts on the 2022-23 ILEARN assessment.	Our scholars have been disproportionately impacted by pandemic-related learning loss. Furthermore, at least 25% of the students we serve are new to the country and are English Learners, and 15% are special education students. Many of our students live in housing projects and hotels, as our community is highly transient. These factors compound the challenges that already exist with improving ELA proficiency. We will work on strengthening the implementation of our educational model and tailoring interventions and support systems for students with special needs. This includes bolstering Tier II Instruction as well as staff professional development to ensure that our scholars consistently receive individualized support.	- Hiring a Bilingual Front Desk Secretary to facilitate student and family engagement - Hiring EL Assistants to support small-group instruction for bilingual students - Provide Content Training and retraining to all teachers to better support effective implementation of Reading Foundations - Stronger universal implementation of Tier II Instruction - More personalized instructional supports through the Reading Advantage Programs to address COVID learning loss and support the learning needs of all student populations - Staffing Reading Interventionists to provide real-time instructional supports - More structured data analysis built into the professional development process

B. Financial Health

Financial sustainability is one of our priority operational goals at PLA@93. Accordingly, the Accountability Dashboard shows that our school "Meets Standard" on "Change in Net Assets Margin," "Aggregated Three-Year Margin," "Debt to Asset Ratio," and "Debt Service Coverage Ratio." In addition, our school has met all performance indicators for domain 2.1, relating to the effective management and monitoring of our budget. By leveraging PLA's resource allocation system and support from Finance and Development, we are able to coordinate multiple sources of funding to ensure that all resources are maximized in alignment with grant guidelines, the schoolwide budget and educational priorities.

While the progress our school achieved has directly supported financial sustainability, we recognize that there remains room for growth. With the unprecedented pandemic bringing both instructional and financial challenges to the fold, building our financial strength is more important than ever. First and foremost, PLA@93 prioritizes the academic needs of our scholars. Scholar needs have increased

significantly because of the pandemic, which has increased the financial strain on our school as we intensify evidence-based strategies to address learning loss. Moving forward, we seek to strengthen our capacity to meet student needs while balancing financial health. Please find our analysis in the chart below.

Key Performance Domains	Key Observations	Strategies for Improvement
Financial Accountability The Financial Accountability Metrics show that the school "Does Not Meet Standard" on Current Ratio (-.08) and Days of Cash on Hand (4.67).	The current ratio and days of cash on hand are below target as the school is focused on providing scholars with the staff, materials and supplies necessary to strengthen academic proficiency and enrollment as we continue to recover from the pandemic. The current ratio and daily cash on hand will increase as enrollment grows and cash flow increases.	We will closely manage all purchases including furniture and fixtures, technology, curriculum and materials to ensure that the school only needs to purchase for new enrollment growth and modest replacements.
Annual Enrollment Change The pre-pandemic enrollment for SY19-20 was 457, 370 in SY21-22, and 369 in SY22-23.	While enrollment has held steady over the last two school years, PLA@93 is still working to recover after the pandemic-related enrollment drop since SY19-20. The pandemic created unique challenges to schools across the country including PLA@93 where many students opted to enroll in virtual or home school options. Some challenges remain as we work to increase the school's enrollment back to pre-pandemic levels, including transportation challenges and the increased demand for virtual school options. However, we are seeing an upward trend in enrollment so far this year with enrollment currently at 415 for SY23-24.	PLA is expanding our enrollment team to include regional enrollment coordinators. By working alongside school leadership and the PLA marketing team, they will be able to increase enrollment by facilitating community engagement efforts. Additionally, school and regional leadership are working in concert with our enrollment and marketing teams to drive local recruitment efforts, by tapping into our long-standing relationship with key community partners, including housing complexes, churches and other community-based organizations. Furthermore, we are providing bilingual support for families so that they can tap into transportation options. Finally, PLA will use a data-driven system with KPIs to ensure PLA@93 remains on

		track to reaching enrollment goals.
Cash Flow & Multi-Year Cash Flow Cash Flow (-230,682.00) and Multi-Year Cash Flow (-621,408.00) do not meet standards.	2022-2023 enrollment at PLA@93 was 369 and 2023-2024 enrollment is currently 415 against a budgeted enrollment of 454. PLA determined that it was in the best interest of scholars and staff to retain staff and serve scholars with smaller class sizes since scholars needed extra support during virtual learning and after the return to in person classes. Carrying extra staff resulted in extra costs and reduced cash flow.	Growing enrollment at PLA@93 and aligning staff with actual enrollment numbers will ensure that we meet these standards in the future. School enrollment has steadily increased since last year and is returning to pre-pandemic levels. We will also continue to review expenditures closely to ensure that the budget is aligned to actual enrollment.

C. Organizational and Operational Accountability

Viewing Organizational Compliance as a cornerstone to our school's success, we have placed great emphasis on meeting key benchmarks in this area. As a result of the robust support we receive from the PLA Service Center and strong implementation at the campus level, we are pleased to observe that we have achieved a "Meet Standard" rating for all indicators on the "Organizational and Operational Accountability" Dashboard.

SECTION II: SCHOOL IMPROVEMENT

1. **Describe the school's plans and strategies for sustaining and continuing to build academic, organizational, and operational success over the next charter term. Explain how the school will build and achieve long-term sustainability and success in a) the governing board; b) the leadership team; c) the teaching staff; and d) academic achievement.**

Building on the academic, financial, and operational progress we have made in the current charter term, our school has developed strong plans and strategies for sustaining our positive impact on scholars. We have analyzed and reflected authentically on our recent performance, identifying both strengths and areas of improvements as shown in our Accountability System Dashboard and other data sources. Below please find our plan for building long-term sustainability and success in our governing board, leadership team, teaching staff, and academic achievement.

A. Governing Board

PLA@93 is governed by the PLA board. PLA currently has a strong board in place, with extensive experience in the areas of education, finance, business development, facilities management, organizational leadership, and change management. Please find their bios below:

Dr. Fernando Reimers, Professor of International Education and Director of the International Education Policy Program at Harvard Graduate School of Education: Dr. Reimers' research focuses on educational innovation and on the impact of education policy,

education leadership and professional development of the quality and relevancy of education to develop twenty first century skills and expand opportunity for socially disadvantaged children and youth. He has designed and led several innovative graduate and executive education programs and curricula and participated in the evaluation of higher education programs and strategies, including the National Research Council evaluation of Title VI, Fulbright-Hays, and other Federally Funded Programs to promote the Internationalization of American Universities. He completed an Ed.M. and Ed.D. in Administration, Planning and Social Policy at the Harvard Graduate School of Education and an undergraduate degree in Psychology at the Universidad Central de Venezuela. He is a member of the Massachusetts Board of Higher Education, the Council of Foreign Relations, a Fellow of the International Academy of Education, as well as a member of the United States National Commission for Unesco. He is currently serving on the Global Learning Leadership Council of the American Association of Colleges and Universities Project "General Education for a Global Century" focusing on some of the pressing issues related to global learning and undergraduate education. He serves on the board and advisory boards of several educational organizations. Dr. Reimers will lend his support and expertise in the development of the educational program, particularly in the area of English language education.

James S. Phalen, Vice Chairman at State Street Global Advisors (retired): Mr. Phalen retired from State Street Bank in 2017 as a vice chairman and member of the management committee. During his career, he managed the firm's international businesses, technology and operations, asset management business, and most recently led regulatory affairs and compliance. Prior to State Street, Mr. Phalen was the chair and CEO of Citistreet, a private company that provided retirement and healthcare administrative services to firms in the U.S. and Australia. Before joining Citistreet, Mr. Phalen was the President and CEO of Boston Financial (BFDS), a private company providing shareholder record keeping services to Mutual Funds. Mr. Phalen is Chairman of the Boston Medical Center System Board. He is also a board member of Camp Harbor View and Phalen Leadership Academy. Jim holds a degree from Boston College and graduated from Stonier Graduate School of Banking. He also attended the executive development program at Massachusetts Institute of Technology's Sloan School of Management.

Kristopher Kingery, Chief Education Officer, Gibraltar Design: Mr. Kingery has served in various leadership and teaching positions in Pike Township in Indianapolis. He has been recognized for his initiatives and innovative solutions that have led to impressive outcomes for children. In addition, Mr. Kingery is largely recognized as the most successful Program Manager in Summer Advantage USA's history. Mr. Kingery earned his M.S. in Administrative Leadership from Indiana University Bloomington and his B.S. from Indiana State University. Mr. Kingery earned his M.S. in Administrative Leadership from Indiana University, Bloomington and his B.S. from Indiana State University. Born and raised in Indianapolis, Mr. Kingery continues to lend his support and expertise in the development of the educational program and leadership development of PLA.

Marlin Jackson, Super Bowl Championship Cornerback for the Indianapolis Colts; Executive Director at Fight for Life Foundation: Marlin Jackson grew up in extreme poverty in Sharon, PA, and became the first member of his family to attend college. Jackson attended the University of Michigan, where he played for coach Lloyd Carr's Michigan Wolverines football team from 2001 to 2004. As senior team captain in 2004, he was a first-team All-Big Ten selection, and a consensus first-team All-American, having received first-team honors from the Associated Press, American Football Coaches Association, Football Writers Association of American, The Sporting News, and ESPN. As a cornerback for the Indianapolis Colts, Jackson caught a crucial interception

with 18 seconds left in the 2007 AFC Championship game to send them to Super Bowl XLI against the Chicago Bears, which they subsequently won. Since retiring from the NFL, Marlin has devoted his life to giving back to others through his foundation, the Fight for Life Foundation.

Earl Martin Phalen, Founder & CEO, George and Veronica Phalen Leadership Academies: Widely recognized as one of the nation's top social entrepreneurs, Earl Martin Phalen is the Founder and CEO of the George and Veronica Phalen Leadership Academies. While at Harvard Law School, Earl founded Building Educated Leaders for Life (BELL) in Boston, Massachusetts, which grew from a local community service project to a national non-profit educating 15,000 children annually and from an annual budget of $12,000 to $27.5M annually. Through his work in the out-of-school time sector, Earl and his team were encouraged to expand their 25-day summer program model to a year-round school model. The resulting network of K-12 public schools is called the George and Veronica Phalen Leadership Academies (PLA) in honor of his parents. Under Earl's leadership, PLA has grown from 1 school serving 300 students to a national network of 23 schools serving 10,000 students, while helping our most vulnerable communities achieve exceptional educational outcomes. In addition to transforming multiple F-rated schools into A-rated schools, PLA has empowered its scholars to consistently demonstrate educational growth each year. Beyond academics, PLA scholars have created original plays, delivered theatrical performances, and constructed their own submersible robots. Earl has been recognized by MSNBC, TIME, New York Times, Education Week, IndyStar, Black Entertainment Television, and Presidents Clinton and Obama. He holds a BA in Political Science from Yale University and a JD from Harvard Law School.

The impact of PLA, its leadership team and staff on the lives of children has earned recognition from numerous regional and national organizations and publications, including: Mr. Phalen's acceptance into the Pahara-Aspen Institutes' Education Fellows Program, a diverse group of leaders who are transforming America's public schools; and the Mitch Daniels Leadership Foundation's Daniels Leadership Prize, in which the former Indiana governor's foundation recognized Mr. Phalen as a leader who is making an exceptional impact across the state. PLA has also been recognized as the organization that was most outstanding in its contribution to education nationwide through the Make It Better Philanthropy Award.

We are also working to increase the diversity of our board of directors and incorporate more perspectives and experiences that will help sustain the impact of sound governance. We have initiated outreach efforts to look for talented leaders who can help bolster the board's capacity to further support key areas, including stakeholder management, operations, college and career readiness. We will utilize the following process to add new board members:

1. Hold an introductory meeting to determine candidate interest and alignment with mission.
2. Candidate submits curriculum vitae/resume and letter of interest.
3. Hold interview to determine the potential member's capacity to fulfill essential responsibilities, including a) attending regularly scheduled board meetings; b) reviewing and approving operating budgets; c) supporting educational programing for our scholars (i.e., serving as guest speakers, hosting career day visits, or supporting a college campus visit for our scholars); and d) engaging in efforts to raising the visibility of PLA.
4. Based on initial meetings and interest, invite prospective board members to visit our school.
5. Hold an additional meeting to share feedback on the candidate and reach a mutual decision regarding the candidate's interest level and commitment to serve.

6. Conduct formal selection process – at regular board meetings, the selection and hiring of a new board member is raised as a discussion item and voted upon.

Another area where we will plan on bolstering the effectiveness of the PLA board will be deeper integration and utilization of performance management systems and processes. PLA@93 utilizes key systems such as the PLA Coaching Cycle, data dashboards, NWEA assessment reports, and staff evaluations. As a school and organization, we are working to improve implementation effectiveness of our key systems and processes; and embedding these data-driven practices more consistently into our regular touchpoints. During board meetings, we will more intentionally integrate opportunities for the board to review our performance dashboards, ask probing questions, and work in partnership with school and academic staff to devise meaningful solutions to address any performance gaps. Both announced and unannounced site visits are available to the board, in addition to performance reviews at the school level. We also support the board in effectively evaluating and supporting school performance through the following training opportunities:

1. <u>External experts who will provide workshops:</u> Key topics include organizational strategy, strategic planning, gathering, and presenting stakeholder feedback, developing a decision-making matrix, and more. Experts will also bolster board member knowledge by sharing best practices from the field for each topic.
2. <u>Board members with functional expertise will provide training to fellow board members</u>: For example, a board member with a strong academic background may walk others through understanding and drawing meaningful interpretations from NWEA assessments. Similarly, a board member with nonprofit financial management may train others on processes and systems to continually refine resource allocation.
3. <u>Internal experts who will provide training at board meetings:</u> For example, our academic team may train board members to view scholar data using the scholar data warehouse. Similarly, our compliance team may provide an overview of applicable state, federal and local laws by which our school abides.
4. <u>Program partners</u>: Will provide training on the specific ways they are supporting our school.

Through these strategies, we will ensure that each board member has a strong understanding of key school components such as academics, finance, and professional development. The overall goal is for our board members to work as a team with PLA@93 in helping our scholars excel.

B. Leadership Team
PLA@93 has a strong leadership team in place. Our leaders have worked for decades in Indianapolis to improve educational outcomes for children. They are deeply committed to our scholars and bring to the school a proven track record of improving educational outcomes. Below please find bios for our key school leaders:

Jeff Hendricks, School Leader: Jeff Hendricks was born and raised in Indianapolis. Before becoming a principal, he taught Kindergarten, 2nd, 3rd, 4th, and 6th grade in IPS and Wayne Township. A graduate of Marian University, Mr. Hendricks is a proud educator of 24 years. As a 3rd grade teacher, he was one of the original staff to develop and implement Project: RESTORE, a grassroots program focused on academic growth and proficiency. He is passionate about educating urban children and watching them grow and takes pride in knowing his staff provides a safe place

for children to learn. Mr. Hendricks is very proud to be a part of Phalen and is thankful to work with such a dedicated group of educators, for the good of an incredible group of scholars.

Keith Yost, Assistant Principal: Keith Yost is a dedicated and committed educator with more than ten years of experience serving in various roles in education. In his most recent employment, he worked as a Physical Education and Health Teacher and Assistant Principal at St. Pius X Catholic School in Indianapolis. Yost graduated from Indiana University with a degree in Physical Education and Health. He also has a master's degree in educational leadership from Marian University. Yost considers himself lucky to work at a job he loves where he can make a difference in the lives of the people he works with.

Sarah White, Assistant Principal: Sarah White is a dynamic turnaround school leader, with over 17 years of experience in K-12 education. As an educator, she has served in the roles of teacher, ELA teacher, reading specialist, dean of curriculum, special education teacher, and assistant principal. In 2014, she was a founding school leader at a school in Washington, DC created to support students in special education in need of a high level of support. As lead Behavior Interventionist and Crisis Response team lead, Sarah learned how to create and implement plans to support positive student behavior and lead a team in best practices to de-escalate students in distress. Shortly thereafter, she transitioned back to New York City to work as a Dean in an Elementary School and then as a founding middle school Director. Sarah moved back to her home state in 2021 and began working as an Assistant Principal at PLA@93 in January of 2022. Sarah is also the Site Director and Coach for Girls on the Run at the school, which is a program that works with elementary age girls to build leadership and life skills while working toward goals and being physically active.

Nicole Fama, Regional Director: Nicole Fama is a seasoned educator with over 15 years of district, education, and innovation experience, along with a track record of success in urban school turnaround. Before coming to PLA, she taught for 12 years with IPS at various levels (third, sixth, and tenth grades at Title I schools). She also served as an IPS Dean of Student Discipline and Culture for six years before transitioning to her role as a building principal. During her time with IPS, she was part of the leadership team at Arlington Woods High School that founded Project RESTORE; she created, wrote, and coordinated all discipline policies and procedures under the new program. As part of this effort, Nicole has led turnaround efforts at three Indianapolis schools, improving their state ratings from Fs to As. She has gone on to build positive student, parent, and community relationships to sustain the academic results Project RESTORE creates. Nicole has been a principal for four years and is currently serving as school leader at both a K-6 building and a middle school. Both schools have earned and are maintaining an A-rating. While teaching Nicole was voted teacher of the year twice and was named a Hubbard Top 10 Outstanding Educator in 2014. She has also received the Above and Beyond the Call of Duty award, the Indianapolis Peace in the Streets award, and the Senator Richard Lugar Patriot award. Nicole served in 2016-17 as the committee chair of the Indiana Education and Testing Reform Panel after being directly appointed by former Governor Mike Pence. In 2017, Nicole was awarded with the highest honor the Indiana Governor can bestow, the Sagamore of the Wabash Award. Nicole has a BS in Elementary Education from Indiana University and a M.Ed. in Educational Leadership from Indiana Wesleyan University. Nicole continues to strive for excellence through her commitment to ensuring that as many scholars as possible have access to the PLA model.

In addition to a strong school-based leadership team, we have the support of a robust leadership team at the PLA Service Center. PLA leaders have devoted their careers to improving the lives of children in underserved communities. The PLA team includes over 100 leaders. They bring decades of classroom experience, school and instructional leadership track record, project management expertise, and substantial knowledge in key operational aspects, including compliance, reporting, and program management. PLA's senior leadership team offers exceptional experience in a wide range of functional areas, allowing our school leaders and teachers to focus fully on the academic success of our scholars. The team includes our Founder and CEO, Earl Martin Phalen, who has more than 30 years of education leadership and executive experience; our Academics department led by our Chief Academic Officer who has over 25 years of experience in teaching, professional development, and education leadership; our Talent department led by our National Director of Recruitment who is an experienced nonprofit recruitment executive with over 20 years of experience in data-driven talent recruitment; our Human Resources team led by our Chief Human Assets Officer who has more than 20 years of experience in leading schools and developing educators; our Operations team led by our VP, Operations who has successfully supported thousands of educators and scholars in his two-decade long career; our Finance Department led by our Chief Financial Officer who has over two decades of experience in finance and accounting, including payroll and benefit management, internal and external reporting, annual budgeting, and audit management; and our Legal and Compliance department led by our Chief of Compliance, Legal and External Partners who has more than 20 years of experience supporting schools maintain compliance with applicable standards.

Please find below bios for some of our key leaders:

Earl Martin Phalen, Founder & CEO: Widely recognized as one of the nation's top social entrepreneurs, Earl Martin Phalen is the Founder and CEO of Summer Advantage and the George and Veronica Phalen Leadership Academies. While at Harvard Law School, Earl founded Building Educated Leaders for Life (BELL), which grew from a local community service project to a national non-profit educating 15,000 children annually and from an annual budget of $12,000 to $27.5M annually. Earl then founded Summer Advantage USA, a summer reading program that has served 20,000 children in six states since its inception in 2009. Both BELL and Summer Advantage are among the very few expanded learning time programs in the country to be scientifically proven to raise scholar achievement. As a result of this track record, Earl and his team were encouraged to expand their 25-day summer program model to a year-round school model. The resulting network of K-12 public schools is called the George and Veronica Phalen Leadership Academies (PLA) in honor of his parents. Under Earl's leadership, PLA has grown from 1 school serving 300 scholars to a national network of 23 schools serving 10,000 scholars, uplifting children from our most vulnerable communities. In addition to transforming multiple F-rated schools into A-rated schools, PLA consistently helps its scholars achieve outstanding growth. Beyond academics, PLA scholars have created original plays, delivered theatrical performances, built mobile apps, and constructed their own submersible robots. Earl has been recognized by MSNBC, TIME, New York Times, Education Week, IndyStar, Black Entertainment Television, and Presidents Clinton and Obama. He holds a BA in Political Science from Yale University and a JD from Harvard Law School.

Andrea Robinson, Chief Academic Officer: Andrea has 23 years of working in the field of education as an educator, instructional coach, building leader, and state DOE employee. She received her BA from Indiana University in elementary education and her master's degree from Indiana Wesleyan University. Andrea worked as a teacher in the intermediate grades in a Title I elementary building. She received the Sallie Mae First Class teacher award and Olin Davis Award.

She was also recognized for her passion in teaching when she was honored with the district-wide Indiana Teacher of the Year award in 2009. She eventually became the instructional coach for her K-5 building where she used her knowledge of best practices to lead other educators in professional development, classroom management, differentiation, PBIS, tiers 1-3 instruction/intervention and data analysis to drive effective classroom instruction. As a building leader, she helped lead her building from an accountability grade of an F to an A in two years. Andrea has also provided professional development for the University of Indianapolis' elementary education program and for educational webinars with Kappa Delta Pi. Andrea most recently worked at the Indiana Department of Education in the Office of School Improvement as an Outreach Coordinator for Marion County, working closely with schools and districts to develop best practices for schools in turnaround status. After conducting classroom walk-throughs and leadership/staff interviews, she worked with the school leadership team to develop the next steps that met the needs of each individual school. She often provided differentiated professional development for each school for this process. Andrea also served as the IDOE case manager for a district in the State Development Network (SDN) to ensure the development of district system alignment and improve student achievement.

JoAnn Gama, Chief Human Assets Officer: JoAnn has more than twenty years of experience serving in various roles at educational nonprofits and school districts. In her most recent employment at IDEA public schools, JoAnn served in leadership positions including school leader, Chief of New Schools, Chief Operating Officer, Superintendent, and a CEO. As CEO for IDEA, JoAnn managed 130 schools and more than 68,000 scholars across Texas and Louisiana. Prior to IDEA Public Schools, JoAnn served as a classroom teacher at Aldine ISD, in Texas. As the Chief Human Assets Officer at PLA, JoAnn focuses on meeting data-driven KPIs for several key HR priority areas, which include recruiting and onboarding talented educators and staff; providing opportunities for ongoing teacher development and retention; and maintaining a strong school leadership pipeline. JoAnn graduated with a Liberal Arts degree in International Relations from Boston University and obtained her master's degree in educational leadership from the University of Texas.

Javier Dimas, VP of Operations: Javi has more than 20 years of experience in sales, strategy, operations and management. Javi's career began in the classroom teaching History and Government to High school students. He then transitioned into higher education to help young adults gain technical working skills. As an Executive Director at STVT, he led the successful launch and sustained growth of a new campus along with several satellite campuses. He was promoted to Vice President of Operations and led the growth and acquisition of campuses throughout the state of Texas. After 6 successful years, Javi transitioned into the CMO space with IDEA Public Schools, first as the VP of Auxiliary Services and then VP of Student Operations and led IDEA's regional directors and student recruitment teams. Javi transitioned over to Achievement First as the VP of Operations. While at AF, he strengthened operating mechanisms, introduced wage models and reimagined student recruitment and enrollment for 36 schools throughout New York, Connecticut and Rhode Island. After several years, Javi returned to Texas to work with H-E-B, the sixth largest private company in the US. During the pandemic, he joined Uncommon Schools as the Associate Chief of Operations for Camden, NJ. He was recruited by Chick-Fil-A as the Director of Operations to increase sales, open and refresh several stores in south Texas. Javier is a first-generation graduate. He graduated with a Bachelor of Arts degree from Baylor University in Political Science and a minor in business and obtained his Masters in Government from University of Texas.

Amber Deckard, National Director of Recruitment: Amber is an accomplished Executive in the nonprofit industry. She has over 20 years of experience in nonprofit leadership including human resources and talent management. Amber first joined the team in 2010 as a Regional Director for Summer Advantage where she was instrumental in helping the program reach thousands of scholars across the country. In 2014 Amber was called to serve as a Regional Vice President for a national nonprofit charged with improving birth outcomes and health equity for moms and babies in the US. During her tenure, Amber was successful in building teams across 26 Markets in the Midwest, supporting a reduction in both premature birth and health equity disparities – both critical focuses for the Foundation.

Nicole Scott, Chief of Compliance, Legal and External Partners: Nicole Scott joined PLA with over 10 years of experience as an attorney and leader in the education/charter school industry. Most recently, Nicole served as Chief of Employee Solutions & Legal Affairs for KIPP Los Angeles Schools. In this role, Nicole served as General Counsel and led the human resources department for all school sites operated by KIPP LA. Nicole also managed the relationship between KIPP L.A. and Los Angeles Unified School District, the organization's authorizer. She was instrumental in getting a K-8 charter school approved through Compton Unified School District for KIPP as well. Prior to joining the KIPP team, Nicole worked with the Inner-City Education Foundation as SVP of Talent and General Counsel where she was instrumental in getting the first charter middle school approved through Inglewood Unified School district. Before committing her career to education, Nicole was an associate at a leading law firm in Los Angeles and worked for various entertainment companies such as Sony Pictures and the William Morris Agency. Nicole is a proud alumna of Spelman College and the UC Berkeley School of Law, Boalt Hall.

Eva Spilker, Chief Financial Officer: Eva has served as Controller and Finance Director at Diamondback Direct, an international division of Quadriga Direct Mail Holdings—a leading global provider of direct marketing services. Her responsibilities included all finance and accounting functions as well as short- and long-term forecasting, payroll and benefit management, internal and external reporting, executive team and board presentations, margin and audit management, and annual budgeting. Eva's career in finance began in the Corporate Financial Consulting Division of Ernst & Young in Baltimore, Maryland. She then transitioned to the Economics Group of CSX Intermodal where she developed long term planning models as well as all capital expenditure justifications and analyses. After CSX, Eva transitioned to a partner role in a regional advertising agency where she managed all finance and operations functions. Eva holds an economics degree from the University of North Carolina at Chapel Hill.

Johnny Jin, Chief Strategy & Development Officer: Johnny brings over 15 years of leadership experience creating large-scale social impact. As a member of the founding team, Johnny has worked closely with the Founder and across functional areas to help grow Summer Advantage and launch Phalen Leadership Academies, a national school network serving 10,000 children in some of our most underserved communities. Johnny has consulted with companies and initiatives around early childhood literacy, arts education, US history, and professional development. He earned his BA in Economics from UC Berkeley (where he graduated in two years), and a Master's in Education Policy and Management from Harvard.

C. Teaching Staff
Our school's cadre of teachers is a diverse group of 18 educators and 6 interventionists who possess a wealth of experience and expertise providing strong support to scholars from underserved

communities. Leveraging a comprehensive professional development framework consisting of several data-driven, personalized feedback systems and training opportunities, we work hard to support the retention of our highest performing educators. PLA@93's frequent use of intentional, personalized feedback through data-driven systems such as the PLA Coaching Cycle has also allowed us to reach strong educator effectiveness.

We also have in place sustainable capacity and processes to ensure that the school has a strong teaching staff each year. As we shared earlier, we have a recruitment office of 20+ leaders dedicated to working with school leadership to staff the school with strong teachers. PLA's rigorous, multi-stage process for identifying and screening talent also ensures that students have access to high-quality teachers from the start of the school year. During the first phase of the interview process, candidates complete an online application. If the candidate meets minimum position qualifications, they will participate in a phone interview with PLA's recruitment office. Screening questions focus on the following:

- Learning about the candidate's teaching experience.
- Assessing the extent to which a candidate shares similar experiences with our scholars.
- Examining how the candidate is able to articulate his/her student achievement data.
- Ensuring the candidate possesses proper credentials and content expertise.
- Understanding previous employment experiences and reasons for leaving their previous job.

If Recruitment determines that the candidate's values and experiences are in line with PLA's culture, the candidate will be passed on to the school-based academics and leadership teams for a final in-person interview. The final interview is designed to assess an applicant's alignment with our Academic Priorities for Success. In addition, teaching candidates are required to complete a lesson demonstration, ideally to a live class. Ultimately, our school leadership team will determine whether the applicant fits the needs of our campus.

Selection Criteria
In addition to technical ability, staffers must possess a deep philosophical alignment that supports high performance, consistent achievement, and advocacy for our scholars. We regard these skills, knowledge and abilities as non-negotiables and drivers for success. This professional profile is unique, and as a result, we have developed tailor-made selection criteria, which serve as a blueprint to ensure we select leaders, teachers, and support staff with targeted skills. Below are the key qualities we seek:

Belief	All educators believe that all scholars/children can learn and should be given the opportunity to reach their highest potential.
Personal Responsibility	Educators possess relentless self-efficacy; holding themselves and other team members accountable for the achievement of our scholars/children.
Results-Driven	Has a track record of achieving goals and results.

Communication & Interpersonal	Has the ability to establish impactful relationships across diverse and various groups.
Teacher Proficiency	High instructional aptitude.
Classroom Management	Ability to set a positive tone, culture and expectations.
Collaboration	Understands the value of teamwork.

We understand the value of high-quality educators and know that providing opportunities for their growth means passion, innovation, and results for scholars.

D. Academic Achievement

While education remains the best pathway for change, children from the community we serve face tremendous challenges that make it difficult for them to access high quality education. Over 92% of PLA@93 scholars are children of color, with 78% living in households experiencing poverty. As we shared earlier, we are proud of the growth that our scholars have made. Additionally, we are supported by the PLA network, and below please find highlights of PLA scholar achievement from the 2022-23 school year:

- Black scholars across PLA Indianapolis schools exceeded the district average by 1.2% on the 2022 ELA state assessment, and by 3.7% on math.
- Black scholars attending PLA schools in Indianapolis have outperformed black scholars at Indianapolis Public Schools for both ELA and Math proficiency for the last two years on the ILEARN state assessment.
- PLA's Latinx scholars exceeded the district average by 4.5% on the Math state assessment in 2022.
- Economically disadvantaged scholars exceeded the district average by 1% on the 2022 Math state assessment.
- PLA's English Language Learners performed 1.2% higher than district average on the 2022 ELA state assessment, and by 5.9% on math.

The foundation of our school's sustainable academic improvement is the PLA educational model. There are six pillars of the PLA educational model, collectively referred to as the PLA Academic Priorities for Success. These include:

a) Effective Leadership
b) Strong Culture and Climate
c) Collaborative Staff
d) Effective Instruction
e) Curriculum, Assessments and Interventions
f) Strong Support Systems

As we move forward, we will continue to focus on improving quality implementation of these key priorities:

(a) Effective Leadership
PLA has developed several data-driven systems that are designed to support the success of our school leaders. Some of these systems include the PLA Coaching Cycle for Leaders, a process that systematically supports the growth of our school leaders; our Leadership Evaluation Assessment, a rubric outlining the successful behaviors of turnaround school leaders; and the PLA Leadership Institute, a week-long intensive leadership training institute for school leaders. Weekly tactical meetings with peers, monthly webinars, and tailored professional development also support the success of our school leaders. Lastly, PLA also supports the development of future leaders through our Principal-in-Residence Program, which is a uniquely designed fellowship program tailored to building capacity for aspiring school leaders.

(b) Climate and Culture
Having a school that is safe, loving and nurturing is critical to the success of scholars. PLA serves all students by creating a school culture that gives scholars a sense of belonging and emphasizes academic rigor and comprehensive social-emotional development. One of the ways that PLA schools will support the intellectual and social emotional development of scholars is by cultivating a growth mindset through implementing intentional strategies and tools like Progress Feedback Cycles, Progress-Based Internal Incentives, and Explicit Reflection. These strategies are embedded into PLA's framework for climate and culture management, which is structured around the Positive Behavioral Intervention and Supports (PBIS) model, family engagement, real-time behavioral management, and structured recognition of student progress. We view families as key partners in their child's success, and families play an integral role in facilitating our school culture. We will regularly communicate with families regarding their child's academic progress. PLA has developed a scientifically validated method for partnering with parents; and ensure that our school leaders and teachers are trained in how to effectively engage parents.

PLA also believes that parents are a critical partner in supporting the success of their scholars and the school. PLA has developed a scientifically validated method for partnering with parents; and will train our leaders and teachers in how to engage partners more effectively.

(c) Collaborative Staff
Staff must work together to promote strong professional growth. Our Peer Mentoring Program, Coaching Cycle, Summer Book Club, and Differentiated Professional Development are just some of the ways we build collaborative staff. Our operating methods for high-impact PLCs and Instructional Learning Rounds, and our Staff Appreciation framework also support collaboration.

(d) Effective Instruction
The most important component of effective instruction is hiring strong teachers. PLA also believes that school structure matters, and we have developed a targeted staffing model. Another key to effective instruction includes the implementation of evidence-based curriculum with fidelity. Our professional development program helps ensure that PLA@93 is both implementing an evidence-based curriculum, and that we have sufficient training to implement that curriculum with fidelity.

(e) Curriculum, Assessments and Interventions
For scholars to succeed, educators need to have the instructional materials needed to teach, assess,

and inform instruction. Another critical element of the PLA model is our weekly formative assessment. Using weekly assessments, our school is able to gauge scholar progress in vocabulary, grammar, cold reads and math, and then use this data to inform instructional decisions. This data helps educators address both scholar needs and grouping for Tier 2 instruction, and the specific targeted interventions that will help scholars both catch up and move ahead.

(f) Support Systems
PLA believes that it "takes a village to raise a child." Schools, families and communities provide resources and support systems that ensure success for all scholars. We help our schools leverage these key partnerships, some of which might include: All Pro Dads/Muffins with Mom; wrap-around programming (i.e., summer learning, STEM); and health service organizations.

You will find more information in the following section regarding strategies for ensuring strong implementation.

2. **Identify weaknesses, challenges, and areas for improvement, and detail the school's plans for addressing each of these needs.**

While we have made strong strides in supporting the achievement of our scholars and the effectiveness of our educators, we have identified three key areas of improvement in partnership with ICSB. These include academic performance, financial health, and enrollment. Overall, we believe that year-round, consistent implementation of PLA's data-driven systems and processes will be a key vehicle for sustainable progress.

A. Academic Performance
Proficiency on the Indiana state assessment remains a priority area of improvement for our school. We will implement the following evidence-based academic supports to ensure that our scholars have the tools and interventions necessary to make adequate academic progress.

Daily implementation of Tier II instruction:
To meet the needs of our scholars, PLA@93 is committed to using academic performance data to drive decision-making and adjust the design and execution of classroom instruction. To help us accurately assess scholar progress and needs, the PLA Service Center is building out data warehousing infrastructure so that our school staff can see how scholars are performing. This performance dashboard provides real-time scholar achievement and behavior data, empowering our teachers to assess areas of need and design intentional, differentiated groupings to provide evidence-based Tier II interventions. Prior to the pandemic, Tier II interventions were reserved for scholars needing moderate remediation. Recognizing the impact of learning loss on our scholars overall, we now offer this added layer of personalized support to all scholars to both remediate and accelerate learning where needed. In the 2023-24 school year, we will continue to tighten up our school leaders and educators' day-to-day use of data-driven insights from the Student Data Dashboard, so we can collectively work towards raising scholar performance.

To address the need for improvement in ELA, we are implementing PLA's Reading Advantage (RA) program, which leverages differentiated instructional strategies in response to academic needs. Reading Advantage is a standardized Tier II program in direct response to pandemic-related gaps in literacy proficiency. Our comprehensive approach includes frequent data-driven assessments to identify and measure current scholar literacy needs, as well as small-group instruction and

personalized learning support strategies as evidence-based interventions to support scholar mastery of key literacy skills.

We implement a rotational model which enables extensive small-group instruction and provides multiple learning modalities to target each student's zone of development, combining research-based instruction with mastery-paced work on adaptive learning software. PLA has a proprietary framework for making use of adaptive learning technology to complement high quality instruction. Our program incorporates adaptive learning software and technology (such as Edulastic, Edgenuity, and more) to support data-driven personalized learning for our scholars. Through blended learning rotations, scholars work through both educator-guided interventions and self-paced adaptive learning modules all working in concert to target academic gaps based on real-time performance data. To best understand and meet scholar needs, Reading Advantage is organized around three tiers:

Tier 1 is designed for all scholars and occurs during whole-group instruction. We utilize Into Reading as the core curriculum, which has been rated by EdReports as "Meets Expectations" for K-6. Into Reading for grades K through 2, meet the expectations of alignment and usability. Texts included in the program are high quality and engaging, as well as appropriately rigorous and organized to support knowledge building. The materials include questions, tasks, lessons, and practice that support students' development of reading, writing, speaking and listening, and beginning to think critically. Implementation and usability support for teachers to assure students meet grade-level goals.

Tier 2 is for all scholars and occurs during our small group learning time. This tier focuses on foundational reading skills support. For grades K-2, PLA recommends small-group instruction based on foundational reading skills. Instruction will be based on skills in phonemic awareness, phonics, fluency, vocabulary, and finally comprehension. Materials for this instruction could include Orton Gillingham materials as well as decodable books. For grades 3 and up, PLA utilizes the guiding reading approach, where a teacher works with a small group of scholars who are reading at a similar level or share common deficit skills. Materials for these grades could include leveled text or OG materials for those that need additional support with phonics practice.

Tier 3 is only for scholars who are 2 or more grade levels behind. Tier 3 supports occur during small group instruction where interventionists, SPED, and EL push-in for additional support. This tier serves as the foundational intervention system. For grades K-2, PLA implements a strong phonics-based program (i.e., Burst/MClass) for additional practice. For grades 3 and up, PLA utilizes the continuation of a strong phonics-based program for those scholars that still need support. For those ready for fluency, we work from decodable readers to leveled readers.

The structure of Reading Advantage has Reading Interventionists providing in-person support throughout the day, working with two groups of scholars in every class for thirty minutes per group. Ultimately, the goal of this program is to improve reading proficiency each year.

Customized training opportunities: At PLA@93, we are committed to providing our teachers and school staff with the professional tools they need to excel. Our core systems are designed to replicate best practices and distribute knowledge in a way that is effective in real-time. For example, one of our core systems, the PLA Coaching Cycle, embeds real-time feedback through biweekly classroom observations to support continuous knowledge-sharing and improvement. Similarly, one

of our key processes, our weekly Professional Learning Communities, provides opportunities for educators to share their knowledge and best practices in real-time. This strategic process of refinement through continued knowledge-sharing allows us to build the strength of classroom instruction at our school. Below, please find detailed descriptions of the evidence-based professional development opportunities that we plan to implement with greater fidelity going forward:

The PLA Coaching Cycle: Our primary platform for staff development and retention, the PLA Coaching Cycle consists of weekly observational walkthroughs, personalized coaching, and progressive goal setting aligned to scaffolded instructional domains. The PLA Coaching Cycle's six domains or focused areas of observations are based on Charlotte Danielson's framework. Each domain includes eight indicators for success, creating a very quick and efficient walk-through form for each domain. The six domains are as follows:

- Culture and Behavior Management
- Classroom Management and Environment
- Scholar Engagement
- Effective Lesson Component
- Level 1 Instructional Execution
- Level 2 Instructional Execution
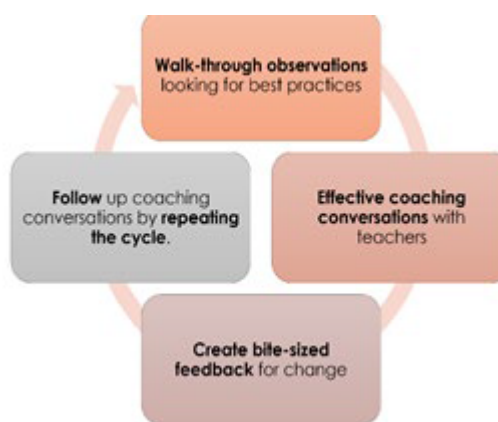
The first step of the Coaching Cycle is to conduct intentional 10–12-minute walk-throughs, looking for evidence of best practices. Instructional coaches will then offer side by side guidance, give positive feedback, and ask leading questions that guide teachers to identify their areas for growth. During this conversation, the teacher and coach will collaboratively create a bite-sized goal for change that will be focused on in subsequent observations. Through this process, teachers have the opportunity to systematically improve their abilities, receiving individualized coaching on specific, actionable strategies that strengthen classroom instruction.

To further support teachers, the PLA Coaching Cycle also has an online platform that allows leaders at both the network level and the school level to identify strengths and opportunities for improvement, both holistically for the school and individually for the teachers. Teachers immediately receive observation feedback through email following the walk-through. The sophisticated analytics provided by our online platform provide leaders with feedback to ensure we are coaching up our teachers and providing our scholars with the high-quality instruction they all deserve. A toolbox of strategies and resources for each coaching area is also available within the Coaching Cycle online platform. This toolbox allows the coach to click directly on the link and share relevant resources with the teacher. The coach will then review the resource with the teacher to increase the likelihood of implementation. The toolbox provides short video clips, activities, articles, book recommendations, and PLA Learning Institute modules to assist with teacher growth.

Moving forward, we will focus on strengthening the implementation of the Coaching Cycle by providing every instructional coach with office hours, as well as monthly training provided by the PLA Academics Team. Providing additional training for managers will ensure that the feedback our teachers receive is consistent and of high quality. Additionally, our school will share weekly fidelity reports with the PLA Service Center so that they can evaluate the extent to which the Coaching

Cycle, as well as its online resources are being utilized on our campus. The PLA Service Center will then use these reports to offer differentiated on-site training and implementation support. These learning opportunities will help PLA@93's school leaders to efficiently and effectively support the instructional development of their educators, and therefore, the academic success of their scholars. Through the consistent execution of our evidence-based system, our teachers will also be able to build strong collaborative partnerships with their coaches, which in turn will increase their job satisfaction and support retention.

Professional Learning Communities: Professional Learning Communities (PLCs) are weekly strategy meetings that allow our educators to collaboratively develop interventions and learn new approaches to implementing best practices that empower scholar achievement. These meetings support the continuous improvement of our educators by offering them a chance to: (a) collaboratively analyze student data and identify areas in need of improvement; (b) compare and share instructional strategies and resources; (c) collaborate and design appropriate interventions, including the incorporation of content literacy across subjects within a grade; (d) develop and refine curriculum mapping; and (e) organize model lessons on specific strategies and standards so that teachers can learn from their peers to improve their own practice. PLCs include focused workshops, planning time, and data deep-dives. The meetings also help to build a positive professional culture on our campus, as they serve as an opportunity for teachers to seek support from each other as they grow in their profession. To strengthen the impact of our PLC's, the PLA Academic Team will provide ongoing support facilitating PLCs and building the culture of learning that is essential to ensuring the success of these communities.

PLA Teacher Institute: To ensure that all teachers feel well prepared for their first day, we also provide targeted, summer training sessions to support new teachers, as well as additional training for all teachers. New teachers receive training on the following components at this institute:

Day 1:
- PLA Model Introduction and Overview (including Curriculum and Standards)
- Safe Schools (Road to Re-entry)
- PLA Coaching Cycle
- PLA Learning Institute
- Brain-Based Learning

Day 2:
- Pedagogy and Instructional Execution
- Parental Engagement
- PBIS Platform and Tools
- PLA Teacher Evaluations

Day 3:
- Developing Curriculum Maps (1st quarter)
- Small Group Instruction and MTSS
- Scholar Engagement (including virtual engagement strategies)
- Creating SMART Goals

This framework for pre-school year professional development allows us to seamlessly transition into our core professional development systems and processes to be implemented during the school year.

PLA Leadership Institute: PLA provides targeted professional development (PD) to school leaders as part of our Leadership Institute. PD topics will focus on the research-based effective leadership levers described in the highly respected book by Paul Bambrick-Santoyo, 'Leverage Leadership 2.0, A Practical Guide to Building Exceptional Schools'. Through interactive, discussion-based work sessions, school leaders will familiarize themselves with the seven key levers of effective school leadership including 1) Data-driven Instruction; 2) Instructional Planning; 3) Observation and Feedback; 4) Professional Development (what to teach, how to teach and how to help content retention); 5) Student Culture; 6) Staff Culture; and 7) Managing School Leadership Teams. Leaders will also receive training on time Management and Planning Tools they can leverage to support effective leadership.

Following the initial work sessions, PLA will provide a 3-day summer Leadership Institute. Building on the seven key levers defined above, PD topics at the institute will include:

Day 1:
- PLA Model Introduction and Overview
- PLA Learning Institute process and tools
- PBIS platform and process

Day 2:
- Benchmark Leadership Coaching Reviews: Coaching leaders around the PLA Academic
- Priorities for Success competencies and tools.
- Leadership Evaluation process and tools.
- Development of the CNA, root cause analysis, and determination of SMART goals.

Day 3:
- The PLA Coaching Cycle platform and process.
- Teacher Evaluation process and tools.

Each day of the institute will begin and end with interactive work sessions focused on understanding, applying and receiving feedback on the seven key effective leadership levers outlined above. Through this thoughtful design, the PLA Leadership Institute will support our school leaders in gaining mastery of the seven research-based key leadership levers prior to the start of the school year.

Data-driven instruction and school management: We recognize that to be implemented effectively, a data-driven approach to school management must include a strong accountability framework that begins with school leaders. Our leadership team will consistently use surveys and student performance data to monitor our progress towards these goals and make intentional adjustments to our management strategies. Instructional Coaches oversee data analysis to further implement teaching best practices into their coaching cycles. In addition to introducing more accountability, we will implement strong quality assurance mechanisms on the school level that ensure that we can meet our goals:

- **Scholar achievement controls:** These include a strategic mix of diagnostic, interim, formative, and summative assessments to monitor progress and inform interventions.
- **Staff development controls:** These include weekly Professional Learning Communities, bi-

weekly observations of the PLA Coaching Cycle, quarterly stepbacks, annual teacher training institutes, and self-paced modules of the PLA Learning Institute, which collectively allow the PLA team and school leaders to assess staff success with the implementation of the PLA model.

- **Leadership effectiveness controls:** These include weekly calls with PLA's Academic Team; Bi-weekly Instructional Review to provide data analysis and reporting to measure growth; Bi-weekly onsite reviews with leadership to report Academic Priorities for Success status; BOY/MOY/EOY Leadership Coaching Reviews; PLA Leadership Professional Learning Communities; and the PLA Leadership Institute.
- **Climate and culture controls:** These include weekly site visits and BOY, MOY, and EOY climate and culture audits to determine each school's success with implementing PLA's framework of Positive Behavioral Interventions and Supports (PBIS); structured recognition of scholar progress in daily small-group instruction and bi-weekly check-ins; and a scientifically validated parent engagement framework.

With these quality-driven systems in place, we plan to make strong improvements to support scholar achievement and educator effectiveness at PLA@93 in the years to come.

B. Financial Health

At PLA@93, financial responsibilities have been consistently managed with success, including budget development and management; state and federal grants; financial forecasting and long-term strategic planning. As a result, our school has met all auditing requirements. With ICSB's partnership, we will continue to build the financial health and sustainability of our school. We have identified three main areas where we can further fortify the school's financial strength:

a) **Budget management:** A key driver of our school's financial health is strong budget management. Through the implementation of effective budget management processes, we will work to ensure that our school will become financially sustainable on recurring government funding for the core operating budget. Key strategies that we will implement to strengthen budget management at PLA@93 include:

- Accurate cash planning forecast - Maintaining a strong cash reserve is essential for the Financial Health of all charter schools, allowing adequate preparation for any unforeseen changes that can yield budgetary impacts. To ensure our school maintains a healthy cash reserve, we will work to ensure accounting actuals are tied closely to cash flow forecasts.
- Improving position control - We will ensure all personnel expenditures are tightly linked to our core operating budget by strengthening position control, the capability that links our Human Resources Information System, which tracks employment and job openings, with our Finance and Accounting systems. By improving this interdepartmental capacity, we will ensure all new hires are budgeted for and aligned with our cash planning forecast.
- Tighter coordination between finance, enrollment, and school leadership - Strong budget management is a cross-functional process that requires collaboration between finance, enrollment, and school leadership. Our expansion of our enrollment team's capacity will strengthen essential linkages across the three departments coordinating to support our school's financial health.

b) **Internal controls for expenditure management:** To ensure a sound financial system at PLA@93, we will implement a comprehensive internal financial control framework, as well as strong financial controls over expenditures. Our school's financial control system is designed to track and safeguard all assets; ensure all financial practices are in accordance with generally accepted accounting principles (GAAP); assign all grant expenses according to the requirements of the approved grant budgets; and maintain appropriate records, financial management systems and individual time distribution records to disburse funds and track program expenditures according to federal, state and grant requirements. We will work to further strengthen implementation fidelity of the following processes:

- Authorization and approval controls for expenditures: Our school's Operations Manager and School Leader are responsible for reviewing and approving invoices for grant expenditures. Invoices for expenditures aligned to the grant budget are specially marked for tracking and reporting purposes. Our Office Manager first reviews the invoices to confirm that the goods were received, or the services were provided. The School Leader completes final review and approval, and then the expenditure is entered into our school's accounting system.
- Intentional delegation of duties and controls for expenditures: Our school ensures that Accounts Payable listings are reviewed and approved by two distinct individuals to maintain clear delegation of duties and ensure accuracy against the approved invoices. We file a copy of the check along with the invoice, voucher, and any supporting documentation at our school.
- Payroll and benefits controls for expenditures: Our Office Manager is responsible for preparing the school payroll, which is then reviewed and approved by our School Leader. Payroll expenses that are part of the grant will be specially marked for tracking and reporting purposes. Approved payroll is submitted to our payroll provider for processing and entered into our accounting system. Monthly payroll reports are included in the Financial Report packet for our Governing Board's regular Financial Review process.
- Expense controls for expenditures: Our school ensures that all expenses are approved prior to the expense being incurred. Staff members must first submit an expenditure request, providing information such as a plan for how the expenditure will be used, a vendor quote, a justification for improving the school or scholar experience, etc. Before expenditures for the grant are approved, they will be reviewed against the final grant budget to ensure suitability against the item description. All expenses must be supported by an invoice or receipt and submitted to the School Leader for approval. Once approved, the expenditure will be entered into our school's accounting system.
- Review and reconciliation controls for expenditures: Our Office Manager and School Leader are responsible for reviewing and confirming vendor statements. Approved statements are reconciled against the AP Aging report. Our school leader reviews bank statements on a monthly basis. Any disbursements are submitted to our Governing Board for review and approval during their regular meetings.

By strengthening fidelity in the implementation of our budget management and expenditure controls, we look forward to continuing to build financial sustainability for PLA@93 in the years to come.

C. Enrollment
One of the primary drivers of our school's financial health is scholar enrollment. We recognize that the COVID-19 crisis continues to place a strain on scholars and their families. Therefore, we see persistent challenges for enrollment. As we develop plans for PLA@93 to increase enrollment, we are focusing on specific strategies in three key areas. First, effective and compelling communication with current and prospective families regarding academic programming using both traditional and social media. We must over-communicate program offerings and be very intentional when doing so. Second, increased outreach to prospective families through community partners. We must leverage community partners to engage with prospective families. Third, additional and more relevant programs before and after school to more closely align with community needs. Parents want a portfolio of activities such as art, music, robotics, as options for their children. With the recent addition of a new enrollment coordinator, a strategic approach to enrollment, and a concerted effort to increase parent communication and engagement, we expect to convert engaging touchpoints and prospective applications to enrolled scholars.

To strengthen scholar enrollment, we will implement the following key strategies:

- Leveraging the capacity of our team: PLA@93 will be supported by PLA's robust Enrollment Department, which consists of talented Enrollment Coordinators with decades of experience in data-driven community engagement, working to meet student recruitment goals, and successful conversion of families from the inquiry to the enrollment stage of the recruitment process. Together with the PLA's Operations team, Enrollment Coordinators supporting our school will work actively on the ground to engage with local families and drive student recruitment and retention for PLA@93.
- Implementing a robust student recruitment plan: Our holistic student recruitment plan a) leverages lessons learned from previous network-wide enrollment campaigns to set specific Key Performance Indicators (KPIs) and targets; b) provides clearly delineated roles and responsibilities for key staff involved in the implementation of the student recruitment plan; c) includes a year-round calendar with engagement activities to support key student recruitment phases such as early interest, lottery, late rush and churn; and d) provides updated communication collateral that can be used effectively to reach and authentically engage with a variety of families.
- Integrating the use of data-driven systems: Utilizing industry best practices, our student recruitment system SchoolMint will provide an online hub to empower data-driven decision-making at all stages of our scholar enrollment and retention process for PLA@93. Equipped with automated, multilingual mobile capabilities, SchoolMint will help us streamline the student recruitment process for PLA@93 while equitably reaching a broad array of interested families. With predictive and real-time enrollment statistics, the enrollment system will allow us to build the financial sustainability of our school by setting and reaching KPIs through accurate, data-driven forecasting.
- Facilitating authentic family and community engagement: Partnering closely with parents is a core element of the PLA approach and a critical step in ensuring the success of scholars. We hold monthly parent events, such as All-Pro Dads and Muffins with Moms. These events are part of our multi-channel community engagement approach which includes:
    - News and print media: PLA pitches news stories to the press on a monthly basis and collaborates with media on coverage within PLA schools.
    - TV and Radio campaigns: PLA boosts visibility for enrollment expansion with appearances and targeted advertisements in local radio stations and TV channels.

- PLA newsletters: Our community members will have the opportunity to register to receive PLA's e-newsletters. Twice per month, PLA sends out news about its schools, supporting family awareness, engagement, and satisfaction.
- PLA's online presence: PLA uses its network web page, social media platforms (Facebook, Twitter, Instagram, and a YouTube Channel), and the PLA Mobile App to share news, updates, and events with the community. PLA also creates a dedicated website for each school, which provides easy access to enrollment documents and supports successful conversion from the inquiry to the application stage.
- Formal and informal community outreach: We will notify local churches, community organizations, and after-school programs about PLA@93, send letters home, conduct phone blasts, and hold community-focused events.

Overall, PLA's approach to enrollment places quality assurance and capacity-building at the forefront. These systems will also help us to support continued academic growth and satisfaction overall, which we expect will have a continued positive impact on scholar enrollment and retention at PLA@93.

3. **Present any additional evidence, beyond the data contained in the final performance report for the charter school, supporting the school's case for renewal.**

In addition to the data we have shared, we are seeing evidence of strong performance in the areas of scholar behavior and social-emotional development. According to the latest dataset collected by IDOE in 2022-2023, we were pleased to see that our school's rates of 2.3% and 0% for in-school suspension and expulsion were below statewide averages of 3.2% and 0.2%, respectively. In addition, our records indicate that PLA@93 is retaining 91% of our teachers. We attribute this to a positive working environment and strong consistency in school leadership. Our principal has been leading the school for seven years and is well-respected and trusted by teachers. Furthermore, we provide retention stipends for teachers who continue to provide high quality education for our scholars. Behavioral data collected by our academic deans revealed a similarly positive trend in the 2022-23 school year. In a particularly challenging school year as schools nationwide continued to manage and sustain a full return to in-person learning, our school averaged only .2 out-of-school suspensions and 0.03 in-school suspensions per week. For our PLA@93 scholars who all face daily life stressors such as violence in their community and the added isolation brought by the pandemic, our school acts as an educational home where they are nurtured by caring adults. With ICSB by our side as a key partner, we can continue to provide a safe, stable, and high-quality educational home for our children and families.

4. **Please provide, as Attachment 1, a detailed five-year-pro-forma budget for the school, including the current school year, by competing ICSB's Budget Projections Workbook.**
   Please see attached.

5. **Please provide, as Attachment 2, a detailed budget narrative providing a high-level summary of the budget and how the budget aligns with the five-year business plan. The budget narrative should clearly describe assumptions and revenue estimates, including but not limited to the basis for per-pupil revenue projections, staffing levels, facilities expenses, and technology costs.**
   Please see attached.

6. **Please provide, as Attachment 3, a single complete Statement of Assurances form, attached hereto as Exhibit C, signed by an authorized representative of the applicant group.**
   Please see attached.

Section III - Proposed Changes

1. **In this section, please specify any changes the school would like to see in any of the material terms in the Charter Agreement.**

Currently, we do not anticipate requesting material changes to provisions of the relevant charter agreement. However, if unforeseen circumstances arise, PLA@93 reserves the right to modify and/or seek material revisions (pursuant to ICSB's process and procedures) to ensure compliance with all other provisions of the charter agreement.

Instructions for Renewal Budget Projections Workbook

☐ = Information should be entered into light gray shaded cells.

Name of Charter School:	Phalen Leadership Academy at George H. Fisher School 93
Location:	Select from drop-down list →
First Year of New Charter (Renewal Year):	2024 - 25 SY

1. Instructions	• 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. • Column and Row references in these instructions are to the Excel spreadsheet Column or Row.
2. Enrollment Projection	• 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.
3. Staffing Plan	• 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. • The estimated "average salary" for each position should include all taxable amounts (including taxable fringe benefits, stipends, bonuses, awards, and allowances). • "Other Insurance" includes health care, long-term care, life, disability. • "Other Benefits" are non-taxable benefits (e.g., educational assistance, dependent care assistance, transportation benefits, non-taxable fringe benefits, etc.).
4. 5-Year Budget	• 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.
Notes:	• 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. • 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.

Ver. 07.26.2023

School Enrollment Projections

(must align with Renewal Application Enrollment Plan)

School Name: Phalen Leadership Academy at George H. Fisher School 93
Location: Please enter School Location on Tab 1.
Renewal Year: 2024 - 25 SY

Is the school an Adult High School (please see instructions):   Select from drop-down list →

Enrollment	Current Year 2023 - 24 SY	Year 1 2024 - 25 SY	Year 2 2025 - 26 SY	Year 3 2026 - 27 SY	Year 4 2027 - 28 SY	Year 5 2028 - 29 SY
Kindergarten	56	59	63	63	63	63
Grade 1	56	59	61	63	62	62
Grade 2	55	59	61	61	62	62
Grade 3	56	58	61	61	61	61
Grade 4	58	59	60	61	61	61
Grade 5	56	61	61	60	61	61
Grade 6	60	59	63	61	60	60
Grade 7						
Grade 8						
Grade 9						
Grade 10						
Grade 11						
Grade 12						
Total K-12 Enrollment:	397	414	430	430	430	430
Adult Learners (1)						
Total Adult Enrollment:	0	0	0	0	0	0
Estimated % of Students:						
Special Education	15%	15%	15%	15%	15%	15%
English Learners	25%	25%	25%	25%	25%	25%
Free/Reduced Priced Lunch	74%	74%	74%	74%	74%	74%
Virtual Students (2)	0%	0%	0%	0%	0%	0%
K-12 Distribution (3)	$ 2,652,357.00	$ 2,765,934.00	$ 2,872,830.00	$ 2,872,830.00	$ 2,872,830.00	$ 2,872,830.00
Adult Distribution (4)	$ -	$ -	$ -	$ -	$ -	$ -

Notes & Instructions

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.

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. ICSB is prohibited from authorizing an adult high school unless the general assembly has made a specific appropriation for the high school pursuant to Indiana Code 20-24-7-13.5. If your proposal is for an adult high school, complete Row 31 only.

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.

3) The "basic" tuition support grant for K-12 schools is equal to the following formula:

(Foundation Amount X ADM) + ((Complexity Multiplier X Complexity Index) X ADM)

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 (2024-25 FY) budget- Foundation = $6,590 for the 2023-24 SY and $6,681 for the 2024-25 SY (and beyond) and Complexity Multiplier = $3,983 for the 2023-24 SY and $4,024 for the 2024-25 SY. 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 October 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 moderate disabilities ($2,930 for the 2024-25 SY). The grant amount for severe disabilities is $11,695 for the 2024-25 SY).

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.

5-Year Projected Staffing Plan

School Name: Phalen Leadership Academy at George H. Fisher School 93
Renewal Year: 2024 - 25 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.

INSTRUCTIONAL STAFF

Position	Current Yr Number	Current Yr Avg Salary	Current Yr Total Expense	Y1 Number	Y1 Avg Salary	Y1 Total Expense	Y2 Number	Y2 Avg Salary	Y2 Total Expense	Y3 Number	Y3 Avg Salary	Y3 Total Expense	Y4 Number	Y4 Avg Salary	Y4 Total Expense	Y5 Number	Y5 Avg Salary	Y5 Total Expense
Teacher	26.0	$59,934.54	$1,558,298.00	21.0	$61,732.57	$1,296,384.07	21.0	$63,584.55	1,335,275.59	21.0	$65,492.09	1,375,333.86	21.0	$67,456.85	1,416,593.87	21.0	$69,480.56	1,459,091.69
Special Education	3.0	$66,960.67	$200,882.00	3.0	$68,969.49	206,908.46	3.0	$71,038.57	213,115.71	3.0	$73,169.73	219,509.19	3.0	$75,364.82	226,094.46	3.0	$77,625.76	232,877.29
Teaching Assistant	13.0	$51,398.00	$668,174.00	13.0	$52,939.94	688,219.22	13.0	$54,528.14	708,865.80	13.0	$56,163.98	730,131.77	11.0	$57,848.90	636,337.92	9.0	$59,584.37	536,259.32
		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -
Total Instructional Staff:	42.0		$2,427,354.00	37.0		$2,191,511.75	37.0		2,257,257.10	37.0		2,324,974.81	35.0		2,279,026.25	33.0		2,228,228.30

ADMIN & SUPPORT

Position	Current Yr Number	Current Yr Avg Salary	Current Yr Total Expense	Y1 Number	Y1 Avg Salary	Y1 Total Expense	Y2 Number	Y2 Avg Salary	Y2 Total Expense	Y3 Number	Y3 Avg Salary	Y3 Total Expense	Y4 Number	Y4 Avg Salary	Y4 Total Expense	Y5 Number	Y5 Avg Salary	Y5 Total Expense
Principal/Asst Principal	3.0	$93,569.64	280,708.92	3.0	$96,376.73	289,130.19	3.0	$99,268.03	297,804.09	3.0	$102,246.07	306,738.22	3.0	$105,313.45	315,940.36	3.0	$108,472.86	325,418.57
School admin	6.0	$52,770.37	316,622.24	6.0	$54,353.48	326,120.91	6.0	$55,984.09	335,904.53	6.0	$57,663.61	345,981.67	6.0	$59,393.52	356,361.12	6.0	$61,175.33	367,051.95
IT	1.0	$58,209.60	58,209.60	1.0	$59,955.89	59,955.89	1.0	$61,754.56	61,754.56	1.0	$63,607.20	63,607.20	1.0	$65,515.42	65,515.42	1.0	$67,480.88	67,480.88
Maint of bldg/grds/equipm	3.0	$44,979.40	134,938.20	3.0	$46,328.78	138,986.35	3.0	$47,718.65	143,155.94	3.0	$49,150.20	147,450.61	3.0	$50,624.71	151,874.13	3.0	$52,143.45	156,430.36
		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -		$ -	$ -
Total Admin & Support Staff:	13.0		$790,478.96	13.0		$814,193.33	13.0		838,619.13	13.0		863,777.70	13.0		889,691.03	13.0		916,381.76

BENEFITS

	Current Yr Rate/Per Employee Expense	Current Yr Total Expense	Y1 Rate/Per Employee Expense	Y1 Total Expense	Y2 Rate/Per Employee Expense	Y2 Total Expense	Y3 Rate/Per Employee Expense	Y3 Total Expense	Y4 Rate/Per Employee Expense	Y4 Total Expense	Y5 Rate/Per Employee Expense	Y5 Total Expense
Health Insurance (2)	$10,494.47	$577,195.96	$10,809.31	$540,465.31	$11,133.59	556,679.27	$11,467.59	573,379.65	$11,811.62	566,957.79	$12,165.97	559,634.59
Retirement Contributions (3)	$3,419.67	$188,082.12	$3,522.27	176,113.26	$3,627.93	181,396.66	$3,736.77	186,838.56	$3,848.87	184,745.96	$3,964.34	182,359.66
Social Security	6.2%	$199,505.64	6.2%	186,353.71	6.2%	191,944.33	6.2%	197,702.66	6.2%	196,460.47	6.2%	194,965.82
Medicare	1.45%	$46,658.58	1.45%	43,582.72	1.45%	44,890.21	1.45%	46,236.91	1.45%	45,946.40	1.45%	45,596.85
Unemployment	2.5%	$80,445.82	2.5%	75,142.63	2.5%	77,396.91	2.5%	79,718.81	2.5%	79,217.93	2.5%	78,615.25
Other Compensation (4)		$ -		$ -		$ -		$ -		$ -		$ -

SUMMARY

	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5
Total Staff	55.0	50.0	50.0	50.0	48.0	46.0
Total Salaries:	$3,217,832.96	$3,005,705.08	$3,095,876.23	$3,188,752.51	$3,168,717.29	$3,144,610.07
Total Benefits:	$1,091,888.13	$1,021,657.63	$1,052,307.36	$1,083,876.58	$1,073,328.56	$1,061,172.17
Total Salaries + Benefits:	$4,309,721.09	$4,027,362.71	$4,148,183.59	$4,272,629.10	$4,242,045.85	$4,205,782.24
Student/teacher ratio	9:1	11:1	12:1	12:1	12:1	13:1
Student/staff ratio	31:1	32:1	33:1	33:1	33:1	33:1

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.irs.gov/publications/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.

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

School Name: Phalen Leadership Academy at George H. Fisher School 98
Renewal Year: 2024 - 25 SY

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

If a line item is completed that include the words "(please describe)" a specific description of the item must be provided in the appropriate box in Column L.
Failure to provide a description as requested will result in rejection of the submission.

REVENUES	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5	Additional Information
State Revenue - See Footnotes							Other State Grants (Row 29)
Basic Tuition Support / Adult Learners Grant - From Tab 2	2,652,957.00	2,766,964.00	2,872,840.00	2,872,840.00	2,872,840.00	2,872,840.00	
Special Education Grant - From Tab 2	176,485.50	181,953.50	188,985.00	188,985.00	188,985.00	188,985.00	
Honors Diploma/Academic Performance Grant							
Career and Technical Education							
Non-English Speaking Program							
Charter and Innovation Network School Grant ($1,400 per student)	496,250.00	579,600.00	602,000.00	602,000.00	602,000.00	602,000.00	
Formative (Interim) Assessment Grant							Difference between our base grant forecast (based off of actual FY20) & ICSB (gddd calc (which covers 20% low)
State Matching Funds for School Lunch Program							
High Ability (Gifted and Talented) Program							
Curricular Material Reimbursement Program ($150 per student)	20,538.20	20,886.50	21,703.93	21,703.93	21,703.93	21,703.93	
Remediation Testing Grant							
Teacher Appreciation Grant							
Other State Grants (please describe) [1]	620,149.50	646,755.00	671,709.28	671,709.28	671,709.28	671,709.28	
Total State Revenue:	3,966,276.20	4,195,099.79	4,357,238.21	4,357,238.21	4,357,238.21	4,357,238.21	
Federal Revenue - See Footnotes							Other Federal Revenue (Row 47)
Public Charter School Program Grant							
Charter Facilities Assistance Program Grant (2021)							
IDEA- Part B Grant (Special Education)	121,480.00	126,342.00	131,549.61	131,649.07	117,068.95	120,580.90	
Title I	488,100.00	504,096.34	523,631.79	549,221.37	551,387.81	572,039.84	
Title II	82,916.00	85,662.51	88,760.93	91,608.97	91,349.19	98,973.58	
Federal Lunch Program	552,543.92	578,666.26	600,099.70	627,252.70	629,770.38	662,663.99	
Federal Breakfast Reimbursement	151,088.96	162,380.10	170,616.56	178,422.58	180,397.26	189,712.68	
Other Federal Revenue (please describe)	1,201,268.60						
Total Federal Revenue:	2,591,051.48	1,236,035.08	1,301,322.91	1,583,362.59	1,380,373.47	1,625,980.66	
Other Revenue							Other Revenue (Row 50)
Contributions and Donations from Private Sources							
Student Fees							
Other Fees							
Interest Income							
Charter School Capital Grants Fund							
Common School Fund							In-kind contributions
Property Tax Sharing (2)							
Operating/Safety Referendum Sharing (2)							
Indiana Bond Bank							
Other Revenue (please describe)	1,577,391.66	1,644,907.25	1,708,509.66	1,708,509.66	1,708,509.66	1,708,509.66	
Total Other Revenue:	1,577,391.66	1,644,907.25	1,708,509.66	1,708,509.66	1,708,509.66	1,708,509.66	
TOTAL REVENUE:	7,932,719.24	7,076,709.68	7,367,060.78	7,686,160.47	7,446,421.35	7,687,728.53	
EXPENSES							
Administrative Staff - See Footnote [3]							
Executive Administration: Office of Superintendent							
School Administration: Office of the Principal	280,708.92	289,130.19	297,804.09	306,738.22	315,940.36	325,418.57	
Other School Administration	316,522.24	326,120.91	335,904.53	345,981.67	356,361.12	367,051.95	
Business Manager/Director of Finance							
Total Administrative Staff:	597,331.16	615,251.09	633,708.63	652,719.89	672,301.48	692,470.53	
Instructional Staff							
Teachers - Regular	1,158,298.00	1,296,384.07	1,335,275.59	1,375,330.86	1,416,590.87	1,459,091.60	
Teachers - Special Education	200,860.00	206,908.36	214,115.71	220,509.59	226,890.06	233,877.89	
Substitutes, Assistants, Paraprofessionals, Aides	668,170.00	688,319.22	708,866.60	730,132.77	696,597.50	536,258.53	
Summer School Staff							
Total Instructional Staff:	2,427,358.00	2,191,611.75	2,257,257.10	2,326,970.92	2,399,084.26	2,230,328.55	
Non-Instructional/Support Staff - See Footnotes							Other Support Staff (Row 79)
Social Workers, Guidance Counselors, Therapists							
Instructional Support Staff [4]							
Other Support Staff (please describe) [5]							
Nurse							
Librarian							
Information Technology	98,209.60	59,955.89	61,754.56	60,607.20	60,525.22	67,680.80	
Maintenance of Buildings, Grounds, Equipment (including Custodial Staff)	144,938.20	148,986.95	143,159.90	147,290.61	151,876.24	156,630.60	
Security Personnel							
Athletic Coaches							
Total Non-Instructional/Support Staff:	243,147.80	208,942.85	204,910.50	211,007.82	217,889.59	223,911.24	
Subtotal Wages and Salaries:	3,217,832.96	3,005,705.68	3,095,876.23	3,188,752.53	3,368,727.29	3,163,610.07	
Payroll Taxes and Benefits - From Tab 3							Other Compensation (Row 90)
Social Security/Medicare/Unemployment	326,632.05	305,079.37	314,231.43	323,658.38	331,624.80	329,177.93	
Health Insurance	577,196.96	560,465.31	534,679.27	573,379.45	566,957.79	559,533.57	
Retirement Contributions	188,082.12	176,114.35	181,396.66	186,808.56	181,755.96	182,359.64	
Other Compensation (please describe)							
Total Payroll Taxes and Benefits:	1,091,888.13	1,021,657.60	1,012,307.06	1,080,876.58	1,075,888.56	1,061,172.17	
Total Personnel Expenses:	4,309,721.09	4,027,362.71	4,148,183.60	4,272,629.10	4,262,685.86	4,205,782.24	
Instructional Supplies and Resources - See Footnotes							Other Instructional Supplies and Resources (Row 109)
Textbooks	138,437.56	111,506.98	119,250.22	95,789.57	80,354.87	64,809.23	
Library/Media Services (Other than Staff)							
Technology supporting instruction (computers, tablets, etc.)	30,638.80	41,482.76	44,076.85	45,707.04	47,078.92	38,491.29	
Student Assessment							
Instructional Software							
Professional Development	23,335.64	25,062.98	26,813.12	27,636.49	28,465.56	29,398.63	
Enrichment Programs (athletics or extra-curricular activities)	1,238.56	1,116.10	1,158.16	1,128.59	1,261.80	1,163.60	
Other Instructional Supplies (please describe)	65,751.20	65,580.73	69,822.13	71,968.32	74,099.57	76,319.57	
Total Instructional Supplies and Resources:	262,180.72	264,650.55	261,516.84	246,261.10	251,061.18	230,202.11	
Administrative Resources							Other Administrative Expenses (Row 114)
Administrative Technology - Computers & software (non-ISS)	50,000.00	51,500.00	53,045.00	54,636.35	56,275.44	57,963.70	
Other Administrative Expenses (please describe)	7,639.28	7,876.76	8,115.12	8,358.57	8,609.33	8,867.61	
Total Administrative Resources:	57,639.28	59,376.76	61,160.12	62,994.92	64,884.77	66,831.32	
Governing Board Expenses							Other Governing Board Expenses (Row 120)
Legal Services							
Other Governing Board Expenses (please describe)							
Total Governing Board Expenses:							
Purchased or Other Services (do not include staff expenses)							Other Services (Row 198)
Audit Services	28,000.00	28,840.00	29,710.09	30,606.94	31,530.74	32,479.08	
Payroll Services	25,000.00	25,750.00	26,522.50	27,318.18	28,137.72	28,981.85	
Financial Accounting							
Printing, Publishing, Duplicating Services							
Telecommunication & IT Services	79,321.80	81,701.50	84,152.54	86,677.12	89,277.43	91,955.75	
Insurance (non-facility)							
Travel							
Mail Services							
Special Education Administrative	135,002.16	139,052.16	143,223.80	147,520.59	151,986.21	156,504.92	
Student Information Services or Systems							
Food Services	516,629.68	540,951.77	578,715.86	596,071.29	613,957.54	632,376.26	
Transportation Services	286,637.96	295,206.20	304,062.38	313,184.24	322,579.78	332,257.10	
Marketing Services	17,450.36	17,973.87	18,513.09	19,068.48	19,640.53	20,229.75	
Other Services (please describe)	250,547.72	301,601.01	310,363.80	319,674.79	329,265.03	339,142.98	
Total Professional Purchased or Other Services:	1,367,549.52	1,430,859.60	1,493,267.23	1,540,125.13	1,586,328.99	1,633,918.85	
Facilities Expenses (do not include staff expenses, e.g. custodian)							Lease, Mortgage, & Other Facilities (Rows 163, 168)
Facility Lease/Mortgage Payments (please describe)	867,570.16	893,597.26	920,405.18	948,017.34	976,457.86	1,005,751.59	
Capital Improvements							
Other Principal Payments							
Operating Leases							
Interest Expense (as accrued)							
Depreciation Expense	26,890.52	26,667.09	27,067.09	26,291.05	29,129.78	30,013.89	
Insurance (facility)	73,932.08	76,150.04	78,012.04	80,760.45	83,187.07	85,683.35	
Purchase of Furniture, Fixtures, & Equipment							
Electric & Gas	47,207.04	48,623.25	50,081.95	51,584.41	53,131.94	54,725.90	
Water & Sewage							
Repair and Maintenance Services (include supply costs)	71,056.20	73,013.89	74,212.14	76,516.11	80,874.79	83,301.03	
Custodial Services (include supply costs)							
Waste Disposal	1,648.60	1,718.06	1,770.22	1,825.52	1,878.00	1,934.56	
Security Services	59,548.92	61,335.39	63,175.45	65,070.71	67,022.83	69,033.52	
Other Facility Expenses (please describe)							
Total Facilities Expenses:	1,147,653.52	1,182,085.40	1,217,544.35	1,258,059.69	1,291,492.80	1,330,443.50	
Other Expenses - See Footnotes							Other Expenses (Row 207)
Indiana Charter School Board Administrative Fee [6]		19,892.68	20,744.51	21,546.23	21,546.23	21,546.23	
Management Fee [7]	762,639.32	359,860.20	155,670.05				
Bank Fees	370.00	381.92	394.09	405.19	417.34	429.86	
Escrow							
Other Expenses (please describe)	17,668.92						ICSB fee not calculating in current year
Total Other Expenses:	780,677.84	125,107.80	175,616.33	21,951.43	21,963.56	21,976.09	
TOTAL EXPENSES:	7,925,430.77	7,069,191.27	7,359,288.64	7,399,032.07	7,437,907.31	7,479,175.15	
CHANGES IN NET ASSETS:	7,260.47	7,517.77	7,774.14	8,068.05	8,354.30	8,553.58	

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 5-2-10.1-4); secured school fund grants (IC 10-21-1-2); teacher and student achievement fund grants (IC 20-43-10-3); student and parent support services grants (IC 20-50-9), etc.
[2] Marion, Lake, St. Joseph, and Vanderburgh counties only.
[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 Coordination 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.

PLA 93

The budget is a conservative view of enrollment, revenue, and expenses to ensure that the school is sustainable on State and Federal funds for each of the five years projected.
Enrollment is expected to grow at a moderate pace (4%) over the next 2 years, until we reach the building max of 430.
Staffing is based on current average salaries and benefits, plus an allowance for 3% annual increases.
Staff ratios are based on 25 scholars per class.
All expenses are aligned to funding available based on annual enrollment.

PLA93 5 Year Budget - Key Assumptions:	FY24	FY25	FY26	FY27	FY28	FY29
Enrollment	397	414	430	430	430	430
Annual Enrollment Growth		4%	4%	0%	0%	0%
Average Basic State Funding Per Scholar	7,121	7,121	7,121	7,121	7,121	7,121
Charter School Facility Grant Per Scholar	1,250	1,400	1,400	1,400	1,400	1,400
Average Other State Funding Per Scholar	1,613	1,613	1,613	1,613	1,613	1,613
Federal Funding Per Scholar (excl Nutrition)	4,757	1,680	1,680	1,731	1,783	1,836
Avg Nutrition per Scholar	1,269	1,307	1,346	1,386	1,428	1,471
Comp. Gr & Philanthropy per Scholar	-	-	-	-	-	-
Other Revenue Per Scholar (In-kind)	3,973	3,973	3,973	3,973	3,973	3,973
Total Funding Per Scholar	19,982	17,094	17,133	17,223	17,317	17,413
Total Full Time Staff (FTE)	55.0	50.0	50.0	50.0	48.0	46.0
Annual Salary Increase	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Facility Lease	867,570	893,597	920,405	948,017	976,458	1,005,752
Total Expenses per Scholar	19,963	17,075	17,115	17,205	17,298	17,393
Net Surplus	7,260	7,518	7,774	8,068	8,354	8,554

PLA Condolidated - FY25 to FY29
JRMS, JRHS, 48, 93, 103, GV, Promise Prep, & VS

	% growth:	-5.1%	3.7%	3.1%	3.2%	3.3%
	Enrollment:	2,729	2,831	2,919	3,013	3,111
	Avg revenue/scholar	*13,684*	*13,672*	*13,667*	*13,661*	*13,654*
	Avg expense/scholar	*13,666*	*13,654*	*13,650*	*13,645*	*13,638*
		Year 1	Year 2	Year 3	Year 4	Year 5
State Revenue		**FY25**	**FY26**	**FY27**	**FY28**	**FY29**
Basic Tuition Support / Adult Learners Grant		22,824,735	23,677,840	24,413,852	25,200,046	26,019,696
Honors Diploma/Academic Performance Grant		81,600	84,650	87,282	90,092	93,023
Special Education Grant						
Career and Technical Education						
Non-English Speaking Program						
Charter and Innovation Network School Grant ($1,400 per student)		3,820,600	3,963,400	4,086,600	4,218,200	4,355,400
Formative (Interim) Assessment Grant						
State Matching Funds for School Lunch Program		25,613	25,613	25,613	25,613	25,613
High Ability (Gifted and Talented) Program						
Curricular Material Reimbursement Program ($150 per student)		201,145	201,145	201,145	201,145	201,145
Summer School						
Remediation Testing Grant						
Teacher Appreciation Grant		44,071	45,393	46,755	48,157	49,602
Other State Grants (please describe) (1)						
Total State Revenue:		**26,997,764**	**27,998,041**	**28,861,246**	**29,783,254**	**30,744,478**
		-				
Federal Revenue - See Footnotes						
Public Charter School Program (CSP) Grant (2)		-	-	-	-	-
Charter Facilities Assistance Program Grant (2011)		-	-	-	-	-
IDEA- Part B Grant (Special Education)		350,954	374,993	386,650	399,101	412,082
Title I		2,338,419	2,498,595	2,576,263	2,659,226	2,745,719
Title II		395,245	422,318	435,446	449,468	464,087
Federal Lunch Program		1,593,765	1,702,935	1,755,869	1,812,413	1,871,363
Federal Breakfast Reimbursement		670,848	716,800	739,081	762,882	787,695
Other Federal Revenue (please describe)		150,000	-	-	-	-
		-				
Total Federal Revenue:		**5,499,231**	**5,715,641**	**5,893,308**	**6,083,089**	**6,280,946**
		-				
Other Revenue						
Contributions and Donations from Private Sources		-	-	-	-	-
Student Fees		-	-	-	-	-
Other Fees		-	-	-	-	-
Interest Income		-	-	-	-	-
Charter School Capital Grants Fund		-	-	-	-	-
Common School Fund		-	-	-	-	-
Property Tax Sharing (2)		-	-	-	-	-
Operating/Safety Referendum Sharing (2)		-	-	-	-	-
Indiana Bond Bank		-	-	-	-	-
Other Revenue (please describe)		4,845,467	4,990,831	5,140,556	5,294,773	5,453,616
		-				
Total Other Revenue:		**4,845,467**	**4,990,831**	**5,140,556**	**5,294,773**	**5,453,616**
		-				
TOTAL REVENUE:		**37,342,462**	**38,704,513**	**39,895,110**	**41,161,116**	**42,479,041**
EXPENSES						
Administrative Staff - See Footnote (3)						
Executive Administration: Office of Superintendent		-	-	-	-	-
School Administration: Office of the Principal		1,788,657	1,842,317	1,897,587	1,954,514	2,013,150

	Year 1	Year 2	Year 3	Year 4	Year 5
Other School Administration (please describe)	2,540,109	2,616,312	2,694,801	2,775,645	2,858,915
Business Manager/Director of Finance	-	-	-	-	-
	-				
Total Administrative Staff:	**4,328,766**	**4,458,629**	**4,592,388**	**4,730,160**	**4,872,064**
	-				
Instructional Staff					
Teachers - Regular	8,914,334	9,181,764	9,457,217	9,740,933	10,033,161
Teachers - Special Education	1,551,712	1,598,263	1,646,211	1,695,598	1,746,466
Substitutes, Assistants, Paraprofessionals, Aides	1,038,022	1,069,162	1,101,237	1,134,274	1,168,303
Summer School Staff	-	-	-	-	-
	-				
Total Instructional Staff:	**11,504,068**	**11,849,190**	**12,204,665**	**12,570,805**	**12,947,929**
	-				
Non-Instructional/Support Staff - See Footnotes					
Social Workers, Guidence Counselors, Therapists	-	-	-	-	-
Instructional Support Staff (4)	-	-	-	-	-
Other Support Staff (please describe) (5)	-	-	-	-	-
Nurse	218,528	225,084	231,836	238,791	245,955
Librarian	-	-	-	-	-
Information Technology	647,822	667,257	687,274	707,892	729,129
Maintenance of Buildings, Grounds, Equipmt (incl'g Custodial Staff)	798,692	822,652	847,332	872,752	898,935
Security Personnel	-	-	-	-	-
Athletic Coaches	-	-	-	-	-
	-				
Total Non-Instructional/Support Staff:	**1,665,041**	**1,714,992**	**1,766,442**	**1,819,435**	**1,874,019**
	-				
Subtotal Wages and Salaries:	**17,497,875**	**18,022,811**	**18,563,495**	**19,120,400**	**19,694,012**
	-				
Payroll Taxes and Benefits - See Footnotes					
Social Security/Medicare/Unemployment (6)	1,574,809	1,622,053	1,670,715	1,720,836	1,772,461
Insurance (7)	3,114,622	3,208,060	3,304,302	3,403,431	3,505,534
Retirement / Pension (8)	944,885	973,232	1,002,429	1,032,502	1,063,477
Other Employee Benefits (9)	-	-	-	-	-
	-				
Subtotal Payroll Taxes and Benefits:	**5,634,316**	**5,803,345**	**5,977,446**	**6,156,769**	**6,341,472**
	-				
Total Personnel Expenses:	**23,132,191**	**23,826,156**	**24,540,941**	**25,277,169**	**26,035,484**
	-				
Instructional Supplies and Resources - See Footnotes					
Curricular Materials	566,614	514,072	463,652	418,619	378,074
Library/Media Services (Other than Staff)	-	-	-	-	-
Technology Supporting Instruction (computers, tablets, etc.)	445,297	475,299	504,333	535,704	569,199
Student Assessment	6,664	7,113	7,547	8,016	8,518
Instructional Software	53,927	57,560	61,076	64,875	68,932
Professional Development	61,027	62,858	64,743	66,686	68,686
Enrichment Programs (athletics or extra-curricular activities)	84,704	90,411	95,933	101,901	108,272
Other Instruction Supplies (not including technology)	309,620	330,481	350,668	372,481	395,771
	-				
Total Instructional Supplies and Resources:	**1,527,852**	**1,537,794**	**1,547,954**	**1,568,282**	**1,597,452**
	-				
Administrative Resources					
Administrative Technology - Computers & Software (not SiS)	92,700	95,481	98,345	101,296	104,335
Other Administrative Expenses (please describe)	202,460	208,534	214,790	221,233	227,870
	-				
Total Administrative Resources:	**295,160**	**304,015**	**313,135**	**322,529**	**332,205**
	-				

	Year 1	Year 2	Year 3	Year 4	Year 5
Governing Board Expenses					
Legal Services	18,481	19,035	19,606	20,194	20,800
Other Governing Board Expenses (please describe)	-	-	-	-	-
	-				
Total Board Expenses:	**18,481**	**19,035**	**19,606**	**20,194**	**20,800**
	-				
Professional or Other Services (not including staff expenses)					
Audit Services					
Payroll Services	197,661	203,591	209,698	215,989	222,469
Financial Accounting	158,564	163,321	168,220	173,267	178,465
Printing, Publishing, Duplicating Services	1,030	1,061	1,093	1,126	1,159
Telecommunication & IT Services	440,633	453,852	467,468	481,492	495,937
Insurance (non-facility)	-	-	-	-	-
Travel	12,125	12,489	12,863	13,249	13,647
Mail Services	6,355	6,546	6,742	6,944	7,153
Special Education Administration	607,573	648,509	688,123	730,926	776,628
Student Information Services or Systems	-	-	-	-	-
Food Services	2,038,152	2,177,761	2,245,455	2,317,765	2,393,152
Transportation Services	1,762,921	1,815,808	1,870,283	1,926,391	1,984,183
Marketing Expenses	62,864	64,750	66,693	68,694	70,754
Other Services (please describe)	489,451	504,134	519,258	534,836	550,881
	-				
Total Professional or Other Services:	**5,777,330**	**6,051,823**	**6,255,897**	**6,470,680**	**6,694,428**
	-				
Facilities Expenses (do not include staff expenses, e.g. custodian)					
Lease/Mortgage Payments (Facility)	3,059,569	3,151,357	3,245,897	3,343,274	3,443,572
Capital Improvements	-	-	-	-	-
Principal Payments	69,055	71,127	73,261	75,459	77,722
Operating Lease Payments	-	-	-	-	-
Interest Payments (NO LONGER REPORTED)	-	-	-	-	-
Interest Expense (as accrued)	225,530	225,530	225,530	225,530	225,530
Depreciation Expense	621,478	640,122	659,326	679,105	699,478
Insurance (Facility)	515,963	531,442	547,385	563,806	580,721
Purchase of Furniture, Fixtures, and Equipment	46,350	47,741	49,173	50,648	52,167
Electric & Gas	615,158	633,613	652,622	672,200	692,366
Water & Sewage	21,195	21,831	22,486	23,160	23,855
Repair and Maintenance Services (include supply costs)	573,405	590,607	608,326	626,575	645,373
Custodial Services (include supply costs)	194,983	200,833	206,858	213,064	219,456
Waste Disposal	156,813	161,517	166,363	171,353	176,494
Security Services	159,799	164,593	169,531	174,617	179,855
Other Facility Expenses (please describe)	-	-	-	-	-
	-				
Total Facilities Expenses:	**6,259,299**	**6,440,312**	**6,626,756**	**6,818,792**	**7,016,590**
	-				
Other Expenses - See Footnotes					
Indiana Charter School Board Administrative Fee (10)	171,186	177,584	183,104	189,000	195,148
Management Fee (11)	110,160	296,864	356,263	442,482	534,386
Bank Fees	1,901	1,958	2,016	2,077	2,139
Escrow	-	-	-	-	-
Other Expenses (please describe)	-	-	-	-	-
	-				
Total Other Expenses:	**283,246**	**476,405**	**541,384**	**633,559**	**731,673**
	-				
TOTAL EXPENSES:	**37,293,558**	**38,655,539**	**39,845,673**	**41,111,207**	**42,428,634**
	-				
CHANGE IN NET ASSETS:	**48,904**	**48,974**	**49,438**	**49,910**	**50,407**

Enrollment Plan for Schools Authorized by the Indiana Charter School Board

1. Please complete all appropriate grey cells. The first six (6) lines are required.
2. The Enrollment Plan Approval Date on line 13 is the date the initital 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.

Name of Charter School:	PLA@93
Designated Representative:	Johnny Jin,Chief Strategy and Development Officer
Contact Phone:	(818) 825-4407
Contact Email:	jjin@phalenacademies.org
Grade Span (Format: "X-X"):	K-6
Maximum Enrollment:	430
Year 1 (Format: "YYYY"):	2024

Initial Approval Date:

Yearly Enrollment By Grade Level

Grade Level	Year 1 2024-25	Year 2 2025-26	Year 3 2026-27	Year 4 2027-28	Year 5 2028-29	Maximum Enrollment
K	59	63	63	63	63	
1	59	61	63	62	62	
2	59	61	61	62	62	
3	58	61	61	61	61	
4	59	60	61	61	61	
5	61	61	60	61	61	
6	59	63	61	60	60	
7						
8						
9						
10						
11						
12						
Yearly Enrollment:	414	430	430	430	430	430

Approved Amendments
(Completed by ICSB)

Approval Date:

Amended Enrollment				Amendment Notes

Name of Charter School:	PLA@93
Current Grade Span:	K-6
Proposed Grade Span:	
Proposed Maximum Enrollment:	
Year 1 of Change (Format: "YYYY"):	

Current Yearly Enrollment By Grade Level

Grade Level	Year 1 2024-25	Year 2 2025-26	Year 3 2026-27	Year 4 2027-28
K	59	63	63	63
1	59	61	63	62
2	59	61	61	62
3	58	61	61	61
4	59	60	61	61
5	61	61	60	61
6	59	63	61	60
7				
8				
9				
10				
11				
12				
Yearly Enrollment:	414	430	430	430

Proposed Amendment to Enrollment Plan

will be autofilled.

		Proposed Yearly Enrollment By Grade

Year 5 2028-29	Maximum Enrollment	Grade Level	Year 1 0-1	Year 2 1-2	Year 3 2-3
63		K			
62		1			
62		2			
61		3			
61		4			
61		5			
60		6			
		7			
		8			
		9			
		10			
		11			
		12			
430	**430**	Yearly Enrollment:			

e Level

	Year 4 3-4	Year 5 4-5	Maximum Enrollment

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.

Earl Martin Phalen
_____
Name

[signature]
_____
Signature

Founder and CEO
_____
Title

10/02/2023
_____
Date