



The Excel Center of West Central Indiana

**A proposal for new school operators
Submitted by Goodwill Workforce Enterprises**

Executive Summary

Wabash Valley Goodwill Industries (Goodwill), based in Terre Haute, Indiana, has been serving the Wabash Valley community since 1927. The organization operates 10 retail stores throughout its 12-county territory and employs approximately 200 employees.

When you hear “Goodwill” you often think of thrift shopping. Wabash Valley Goodwill does offer wonderful thrift shopping, but we are so much more. Our mission is to improve the quality of life for people through employment and personal growth.

But what does that look like? To the 194 people employed, it means financial freedom or an opportunity to work when nobody else saw their potential. To the 2,058 people assisted through our voucher program, it means they got a hand up when they were down due to natural disasters or even the pressures of life.

Our vision for the Wabash Valley is to strengthen the community by engaging people to achieve greater independence. We do that by offering employees help with meeting outside goals, such as help with managing their finances or living situation. And now we are striving to help the area with the introduction of The Excel Center, an adult high school where they can earn a CORE 40 high school diploma.

Wabash Valley Goodwill has been here since 1927. We believe our core values have helped sustain our presence through many changes and growth. We lead with Respect, Integrity, Service, Growth and Stewardship.

In the summer of 2022, Goodwill leadership began exploring the possibility of increasing its education services in Terre Haute, Indiana through The Excel Center school model. After completing its due diligence, including an in-depth feasibility study and extensive community conversations, Goodwill leadership, and community members created Goodwill Workforce Enterprises (GWE) to pursue operating The Excel Center school model.

Mission & Vision

GWE is the nonprofit entity formed by this applicant group to provide governance and oversight of The Excel Center of West Central Indiana. The mission of The Excel Center of West Central Indiana is to provide a rigorous, high-quality educational experience for adults to earn their high school diploma and prepare for future success in college or career. The vision of The Excel Center of West Central Indiana is to further the mission of Goodwill: improve the quality of life for people through employment and personal growth.

Educational Needs of Targeted Community

GWE engaged in an extensive feasibility study process with Goodwill Education Initiatives (GEI), the founder of The Excel Center school model and operator of 16 Excel Center locations throughout central & southern Indiana. In partnership with GEI, GWE examined the need for a high school serving adults within several Indiana counties and based on the significant need in Vigo County and the community support expressed by residents, The Excel Center of West Central Indiana will be located in Terre Haute, Indiana. There are 10,464 adults without a high school diploma in Vigo County, which equates to 12% of the adult population.

In addition to examining the educational needs of adults in Vigo County, GWE wanted to ensure there would be career opportunities for students who graduate from The Excel Center West Central Indiana. As of July 2023, the unemployment rate in Vigo County was 4.5% compared to Indiana’s unemployment rate of 4.0%.¹ According to the Terre Haute Economic Development Corporation, there is a growing need in the Terre Haute area for advanced manufacturing

¹ STATSINDIANA *Indiana’s Public Data Utility*. Accessed September 7, 2023. Retrieved from https://www.stats.indiana.edu/profiles/profiles.asp?scope_choice=a&county_changer=18167

employees, specifically in automotive, steel, plastics, and food products. The Excel Center of West Central Indiana will be uniquely positioned to address employment needs. A core model element of The Excel Center is earning industry certifications that align with the needs of the local job market.

Community Engagement & Partnerships

The most important partnership The Excel Center of West Central Indiana will have is with Goodwill, which will provide back-office support for the school in the form of HR, accounting, IT, facilities, and more. This support from Goodwill will ensure the staff of The Excel Center of West Central Indiana are able to focus their efforts on providing a high-quality school experience for students. GWE will be able to focus on governing the school, long-term plans, and monitoring the services provided by Goodwill to ensure quality and effectiveness.

Meredith Osburn and the Wabash Valley Goodwill team have been engaging the community for over two years on the benefits of bringing The Excel Center to West Central Indiana. In those 2 years Meredith and her team have met with and made presentations to approximately 25 different individuals and local organizations. Meredith has also formed relationships with several local legislators and government officials that have proven extremely important in bringing the school to our community. They have organized 3 lunch and learn sessions that brought in multiple engagements with the community. They also hosted an informational meeting for the community to present the benefits of the school. They have also conducted 5 tours of other Excel Centers in Indiana so community members could see firsthand the benefits of an Excel Center and hear from students why The Excel Center is so important. Meredith has been tireless in bringing The Excel Center to West Central Indiana and also in engaging the community and getting support from local partners.

The Excel Center of West Central Indiana will also partner with other Goodwill organizations operating The Excel Center school model throughout Indiana. This includes GEI, Goodwill Leads, and Goodwill Educates. These Goodwill organizations will work together to share resources and best practices related to educating adults. The school will not only partner with Indiana-based Excel Center locations but will also be part of The Excel Center National Network which will provide support for the school. Staff will be able to participate in positional huddles to problem-solve and learn from other leaders, as well as join professional development opportunities and seek targeted support as needed.

Education Plan & School Design

The Excel Center of West Central Indiana will follow the same educational design as other Excel Center campuses throughout Indiana, however, the school will be tailored to meet the unique needs of the local student population. The Excel Center West Central Indiana's education plan will include a rigorous secondary education. Students will have the opportunity to enroll in flexible scheduling in order to meet their needs as busy adults and be able to take classes that meet their specific education levels. They will also be in a mature learning environment that includes real-life examples and situations throughout the curriculum. The education plan includes postsecondary opportunities through industry-recognized certifications and dual credit courses that help students realize their potential to succeed in college. The Excel Center of West Central Indiana plans to work with local employers to ensure the certifications offered at the school align with the local job market and teach the skills employers need for their workforce.

In addition to the academic elements described above, the school design also includes a focus on supporting adults as they navigate their non-academic challenges. This includes free, onsite childcare, transportation assistance, and The Excel Center's coaching model. Coaches at The Excel Center of West Central Indiana will support students with challenges they face outside of school including finding stable housing, accessing food security, understanding the health and mental healthcare options available to them, and more.

This educational design has been proven to be effective at the 40 Excel Center locations throughout the country, 20 of which are within Indiana. Last year, more than 1,700 students graduated from The Excel Center, collectively earning more than 1,300 industry certifications and 2,200 college credits. In addition, a recent study by the Lab for Economic Opportunity (LEO) at the University of Notre Dame found that graduates from The Excel Center earn 39% more than

their peers five years after graduation.² The Excel Center of West Central Indiana will be an effective way to support adult students in earning their diplomas and increasing their income, ultimately changing the trajectory of their lives. The Excel Center of West Central Indiana will work directly with GEI's national office team to support the opening of the school. The GEI national office team has extensive experience opening The Excel Center school locations in Indiana and other communities throughout the country.

GWE's Capacity

GWE was specifically formed to lead The Excel Center West Central Indiana. The leaders who make up the governing board are community members from the Terre Haute - area who are committed to ensuring the state resources allocated to operate The Excel Center of West Central Indiana are put to the best use possible. The board members bring a wide variety of experience to their roles, including financial management, HR expertise, experience in insurance and risk management, and compliance. Several board members have K-12 teaching experience and every single board member is heavily involved in the Terre Haute community. The board of The Excel Center of West Central Indiana will be able to effectively govern and ensure the school meets the high standards set by ICSB.

Section 1: Evidence of Capacity

Current resumes are included as Attachment 1 for the following individuals who serve on the board and will be involved in the school's operation and development.

Goodwill Workforce Enterprises Governing Board Members

- Betsy Peperak, Chief Operating Officer, RJI Solutions
- John Lukens, Retired
- Kristin Craig, Executive Director, Terre Haute Chamber of Commerce
- Leah Allman, Vice-Chancellor for Enrollment Services, Ivy Tech Community College
- Rene Hankins, Director of Pre-College Outreach, Rose-Hulman Institute of Technology
- Mary Halsted, Retired
- Ryan Keller, Executive Director, Thrive West Central

Key Members of the Applicant Team (Staff)

- Meredith Osburn, President & CEO, Wabash Valley Goodwill Industries
- Carl Conwell, Director, The Excel Center West Central Indiana, Goodwill Workforce Enterprises
- Lisa Walker, Human Resources Director
- Darin May, Director of Workforce Development, Wabash Valley Goodwill Industries
- Dan Davis, Director of Safety and Logistics, Wabash Valley Goodwill Industries

Members of the GEI national office team that will support the training and opening of the school include

- Betsy Delgado, Senior Vice President, and Chief Mission and Education Officer
- Katie Bustamante, Senior Director
- Jaylyn Brown, Policy, Research & Advocacy Manager
- Khalilah Palmer, School Development Director
- Sarah Thomas, Regional Director

Individual Capacity

Betsy Peperak, Chief Operating Officer, RJI Solutions

Betsy is the Chief Operating Officer (COO) of RJI Solutions, a local, best-in-class public affairs firm specializing in government relations, marketing & PR, community development, and grant proposal development. As COO, Betsy

²Brough, Rebecca and Phillips, David and Turner, Patrick, High Schools Tailored to Adults Can Help Them Complete a Traditional Diploma and Excel in the Labor Market (January 21, 2023). Available at SSRN: <https://ssrn.com/abstract=3840453> or <http://dx.doi.org/10.2139/ssrn.3840453>

designs, implements, and manages business operations and strategies that lead to an effective organization. Betsy is responsible for HR functions, quality control, and contract management. Prior to her role as COO, she served as Chief Financial Officer and continues to oversee the financial well-being of the organization, including cash flow, financial projections, and future growth. In addition to her business acumen, Betsy brings experience in education to her role as a GWE board member, she taught high school English Language Arts and Journalism at Paris High School in Illinois. In addition to her K-12 experience, Betsy also taught at the Eastern Illinois University Writing Center and Saint Mary-of-the-Woods College.

John Lukens, Forrest Sherer Insurance

John worked for Forrest Sherer Insurance for 35 years, starting as a Commercial Sales Representative and working his way up to sales manager and then Chief Executive Officer. John not only brings his expertise in insurance to the GWE board, but he is also a pillar of the Terre Haute community. He served on the board of Union Hospital for 22 years and the board of Wabash Valley Goodwill for 25 years. Lukens is a past board chair of the Terre Haute Chamber of Commerce and past director of the Wabash Valley Community Foundation. He has direct educational experience through his past work as director of the Vigo County School Corporation Education Fund.

Kristin Craig, Executive Director, Terre Haute Chamber of Commerce

Kristin has been with the Terre Haute Chamber of Commerce since 2003 and throughout her tenure has worked in a variety of roles and learned every aspect of the organization from administration and financial management to marketing and communications. She brings this wealth of knowledge to her role as a GWE board member and has substantial community reach within the Terre Haute area, serving with the following organizations: Valley Professionals Community Health Center, Art Spaces, Inc.; Leadership Connect of West Central Indiana (formerly Terre Haute Young Leaders), Terre Haute Tomorrow – Image and Communications Action Teams, Wabash Valley Human Resources Association and Valley Child Development Center. Kristin holds a Bachelor of Arts in Journalism and a Master of Leadership Development from Saint Mary-of-the-Woods College.

Leah Allman, Vice-Chancellor for Enrollment Services, Ivy Tech Community College

Leah has served in higher education for the majority of her career. In her current role with Ivy Tech Community College Terre Haute/Greencastle campus, she oversees student enrollment management, student recruitment, registration and records, and dual credit/college enrollment coaches. Previously she served as Vice Chancellor of Student Affairs, responsible for the supervision of 16 direct reports and 50 FTEs, she also oversaw Title IX compliance, disability services, student life, financial aid, academic advising, the onsite campus childcare, and student orientation. She brings all of this expertise to support The Excel Center West Central Indiana. Leah is a member of the National Association for College Admission Counseling and Student Affairs Administrators in Higher Education.

Rene Hankins, Director of Pre-College Outreach, Rose-Hulman Institute of Technology

Through her role as Director of Pre-College Outreach at Rose Hulman and her previous role as Executive Director of Outreach, Rene brings a wealth of experience recruiting students to the GWE board. She has extensive experience managing grant proposals, contracts, and compliance, as well as knowledge of the economic and workforce development needs of the Terre Haute community. Rene holds a State of Indiana Teaching license and is an authorized instructor of Microsoft Office Specialist. She earned two Bachelor of Science degrees, one in Administrative Office Systems and one in Business Education, and a Master of Science in Curriculum, Instruction, and Media Technology, all from Indiana State University.

Mary Halsted, Retired

Mary is currently retired after 30 years in human resources and recruiting. Mary brings with her to the GWE board a deep knowledge of HR functions and strong connections throughout the Terre Haute community. Her HR background included educating clinical and administrative directors on worker's compensation and unemployment. She was responsible for compliance in those areas. She also advised them on the proper steps for employing and discharging employees. Mary was responsible for creating a clerical support pool. This saved time and money by not using temporary agencies.

She volunteers at the Terre Haute Symphony and serves on the Westminster Village Council and as chair of the Westminster Village Library board.

Ryan Keller, Executive Director, Thrive West Central

Ryan is responsible for the operations, compliance, risk management, and contract management for Thrive West Central, which has grown from \$ 5.5 million in revenue to a projected \$ 15 million for 2024. Ryan oversees partnerships with city and state agencies and maintains close connections to the Terre Haute community in this role. Prior to Thrive West Central, Ryan worked for Certell, Inc., an education nonprofit based in Indianapolis. Ryan also taught science for several years in the Greencastle Community School Corporation. Ryan holds a Bachelor's degree in Plant Science and Agronomy from Purdue University and a Master of Leadership Development from Saint Mary-of-the-Woods College.

Meredith Osburn, President & CEO, Wabash Valley Goodwill Industries

Meredith joined Wabash Valley Goodwill in 2010 to become the Director of Retail Operations with Wabash Valley Goodwill. Meredith currently serves as the President and CEO of Wabash Valley Goodwill. With a deep commitment to community improvement and social impact, Meredith has dedicated her career to the service of others. Under Meredith's guidance, Wabash Valley Goodwill has thrived, expanding its reach and impact across the region. Meredith and her team have successfully spearheaded numerous initiatives and partnerships to enhance job training, employment opportunities, and support services for individuals facing barriers to employment. With a heart for service and a mind for positive change, she works on leading Wabash Valley Goodwill towards a brighter future, where everyone regardless of their circumstances, has the opportunity to lead fulfilling and productive lives. Meredith currently serves on multiple boards, including the Terre Haute Chamber of Commerce, Council on Domestic Abuse (CODA), Rotary Club of Downtown Terre Haute, the Advisory board for the Infinity Clubhouse, and at the Wabash Valley Corrections Facility in Carlisle, IN. She graduated from St. Mary of the Woods in 2004 with a Bachelor of Science in business and marketing.

Carl Conwell, Director, The Excel Center Wabash Valley, Goodwill Workforce Enterprises

Carl has been hired to be the school leader of The Excel Center West Central Indiana. Carl has worked in education in the Terre Haute community for approximately the past decade and has experience as a classroom teacher serving students who struggled to be successful in a traditional school environment and has experience as an administrator overseeing education staff. Carl's additional qualifications and experience are further described below in the "school leader" section of this application.

Lisa Walker, Human Resources Director, Wabash Valley Goodwill Industries

Lisa Walker is a dedicated professional with a rich history of making a positive impact on the organizations and individuals that she works with. Lisa is from Terre Haute and attended Indiana State University. She received her Bachelor's degree at ISU and went on to build her work ethic and customer service skills as a project coordinator with Sony DADC.

She started her Human Resources career as an HR Specialist with Odyssey Marketing Group. Lisa played a pivotal role in supporting veterans, service members, and their families in their career transitions. Lisa's work in this capacity emphasized her dedication to facilitating opportunities and supporting those who have served their country, embodying her commitment to service and community betterment.

For the past 4 years, Lisa has proudly become a servant leader within her role as the Human Resources Director at Wabash Valley Goodwill. She focuses daily on the success and maintenance of the organization's long-term mission and goals while ensuring compliance with federal and state regulations as well as compliance with accreditation standards. Lisa's commitment extends to fostering diversity, equity, and belonging within the organization, reflecting her passion for making sure all employees are set up for success and have the opportunity to be better than they were yesterday.

Lisa completed the Senior Leader Program with Goodwill Industries International in 2022 and is a member of the Society for Human Resources Management (SHRM) and the Wabash Valley Human Resources Association, showcasing her commitment to professional development and community engagement.

Darin May, Director of Workforce Development, Wabash Valley Goodwill Industries

Darin joined Wabash Valley Goodwill in 1999 to be an Employment Specialist. He currently serves at the Director of Workforce Development and Mission. For 24 years his work has been assisting members of the community and WVG team members to overcome barriers to employment. And, to develop the necessary skills to improve their employment and quality of life. Darin serves on the United Way Job Skills Impact Council, Wabash Valley Homeless Council, Drug Free Vigo County Council, as well as other collaborations with community organizations. Because of his passion and commitment to WVG's mission and his experience in workforce development, Darin took on the role of Director in 2022. Darin completed studies in Agriculture at Purdue University and is a Certified Employment Specialist through Indiana University.

Dan Davis, Director of Safety and Logistics, Wabash Valley Goodwill Industries

Dan Davis joined Wabash Valley Goodwill in May 2005 as a Truck Driver and quickly realized the importance and impact of WVG's mission. Dan worked his way into a leadership position within a few years and was delegated numerous responsibilities as his career blossomed. Through the continuous display of being detail oriented, success driven, mission focused, and exhibiting exemplary core values, he was promoted to Transportation Supervisor in 2013. Safe operating practices, team development, and procedural effectiveness were the main areas of focus. Due to his dedication, compassion, and perseverance, he was promoted to a director's level in 2017. Dan currently serves as the Logistics and Safety Director and has since June 2022. He has developed strong business relationships with various members of the communities that we serve. Dan completed the Senior Leadership Program led by Goodwill Industries International in August 2022.

Betsy Delgado, Vice President of Mission and Education Initiatives

Betsy is Senior Vice President and Chief Mission & Education Officer at GEI. Betsy joined GEI in 2011 as the Executive Director of The Excel Center. Since then, she has managed the accelerated growth of The Excel Center from one school to over 40 nationwide locations. Promoted to *Vice President of Mission Advancement* in 2013. Her role at GEI was further expanded in 2016 when she was named *Vice President of Mission and Education Initiatives*, where she led GEI's family-focused efforts to improve lives through access to education, employment, and health programs. In her current role as Senior Vice President and Chief Mission and Education Officer, she leads GEI's strategic efforts to help individuals and families access education, employment, and health services. Betsy oversees all of GEI's education initiatives, including The Excel Center—which now boasts 16 locations in central and southern Indiana and over 7,000 graduates. Betsy also provides strategic direction for the Indianapolis Metropolitan High School, GEI's free charter high school for students grades 9-12 who are experiencing barriers to education. Betsy is a Two-Generation Fellow with Ascend at the Aspen Institute and received her MBA at Notre Dame University in 2020. In 2018, she was appointed Chairperson to the Early Learning Advisory Committee by the Governor of Indiana and served as Chair for 3 years. In 2022, Betsy was reappointed by Governor Holcomb to continue serving on the Early Learning Advisory Committee. Betsy is also a Pahara Fellow, cohort 23-24 at the Pahara Institute, focusing on education innovation.

Katie Bustamante, Senior Director

Katie started with GEI at The Excel Center West when it opened in 2013. She served as the college and career readiness specialist before becoming the director of The Excel Center West in July 2015. Currently, Katie serves as the senior director for GEI's national office team, supporting Goodwill organizations across the country in their efforts to open and

operate Excel Centers. She joined the national office team in 2018 as school development director where she helped support school leadership teams and trained school staff in school opening processes and procedures, EL supports, The Excel Center coaching model, college and career readiness, data-driven decision making, leadership development, and other topics. Prior to joining GEI, she was a high school and middle school English teacher and volleyball coach in Indianapolis Public Schools for three years where she also completed her Teach for America corps years. Katie has a Bachelor's Degree in Journalism and American Studies from Miami University, a Master's in Teaching from Marian University, and a Master's in School Administration from Butler University.

Jaylyn Brown, Policy, Research & Advocacy Manager

Jaylyn is the policy, research and advocacy manager for GEI's national office team. Jaylyn works with national partners to assess the aptitude for opening The Excel Center campuses in new territories. She provides support for policy analysis, advocacy planning, and research. Prior to joining GEI, Jaylyn worked for a non-profit organization in Chicago for three years. Her work consisted of building relationships with school administrators, teachers, and community members to discuss ways to positively impact students in the classroom and through policymaking. During her time in Chicago, Jaylyn completed a math fellowship at The University of Chicago Charter School where she worked directly with high school students. Jaylyn is a skilled researcher with an emphasis on data analytics and policy analysis. Jaylyn has an M.A. in Education Policy from Loyola University Chicago.

Khalilah Palmer, School Development Director

Khalilah is the school development director for GEI's national office team. Khalilah is responsible for the comprehensive development and continuous improvement of multiple schools that have adopted The Excel Center model and The Excel Center National Network schools. Khalilah Palmer actively manages relationships with The Excel Center National Network school directors and staff to ensure that all GEI-provided curricular, instructional, and model element materials are developed and deployed to assigned schools. She holds a Master's of Science in Education from Indiana University; a Master's of Business Administration from Indiana Wesleyan University; and an Indiana teacher's license in business education.

Sarah Thomas, Regional Director

Sarah has been a part of the Goodwill family since 2012, working for Goodwill organizations in Indiana and Houston. She has experience in a variety of roles leading grant management, program development, special events, fundraising, and policy analysis. Throughout her career, Sarah has facilitated government and private grant proposals that have resulted in more than \$52 million in revenue. Currently, Sarah works closely with national partners to open The Excel Center campuses in new states. She provides support around engaging local leaders, community development, and fundraising for The Excel Center. Sarah studied sociology and nonprofit management as an undergrad and holds a Masters in Philanthropic Studies from the Lilly School of Philanthropy at Indiana University.

Governance Structure:

The Excel Center of West Central Indiana will be operated by Goodwill Workforce Enterprises (GWE). The board of GWE will hold the charter and have sole governing authority over the school. GWE's board will have between 5 and 7 members. As listed above, the community members who are serving on this board have the expertise needed to effectively govern a school. These individuals have chosen to lead The Excel Center of West Central Indiana because they believe in the mission of GWE and that all students, regardless of age, should have access to the opportunity to earn a high school diploma. These individuals are all active members of the Terre Haute community.

The board started convening on July 26, 2023, below is a summary of what was discussed at the first meeting.

The organizational meeting of the Board of Directors of Goodwill Workforce Enterprises, Inc. was held on July 26, 2023, in the conference room at Wabash Valley Goodwill. As the founding board, they were tasked with reviewing the By-Laws. After a review, the board unanimously approved the By-laws. During the meeting, officers were elected: Kristin Craig – Chairperson; Ryan Keller – Treasurer and Betsy Peperak – Secretary. Board members approved the Conflict-of-Interest Policy and signed the policy. They also filled out contact information sheets. Discussion was held concerning the

Indiana Charter School Board application. Carl Conwell, Director of Goodwill Enterprises, explained to the board that they will be interviewed as a part of the application process. The board was updated on the search for a building for the Excel Center. After an exhaustive search, there are two possibilities. There is a location in Plaza North and another on the south end of Terre Haute. A realtor with 25 years' experience locating Excel Center facilities has been hired.

The board will fully comply with Indiana's Public Access Laws and welcomes the public to engage with the school. To ensure this compliance, the board members and school leadership have familiarized themselves with the Handbook on Indiana's Public Access Laws. The board will comply with all requirements, including but not limited to

- Posting notice of meetings at least 48 hours in advance at the school's "principal office," on the school's website, and giving ICSB notice,
- Posting agendas as required,
- Ensuring the meeting is open to the public, including an electronic means of participating,
- Ensuring quorum, electronic participation, conflict of interest, and voting requirements are met, and
- Documenting appropriate meeting minutes (date, place, members present, etc.).

The GWE Board will primarily focus on high-level policy, approving long-term plans, ensuring the annual budget will lead to financial solvency, assessing the performance of the school leader, and ensuring the appropriate structures are in place to maintain compliance with all state and federal laws and regulations. The day-to-day operations of the school will be managed by the school director and leadership team. The school director will report to Meredith Osburn, who sits on the board of GWE. This governance structure will allow the school to respond quickly and effectively to the needs of students and the community at the local level while allowing the board to maintain effective oversight. The board will meet a minimum of 4 times per calendar year and will post all meeting dates, agendas, and minutes in an easily accessible location on its website.

All board members have signed a Statement of Economic Interest & Conflict of Interest Form which is included in Attachment 2.

Advisory Bodies

The GWE Board will have sole governing authority over The Excel Center West Central Indiana, however, the school director will engage a local advisory group. This advisory body will be responsible for providing input to The Excel Center of West Central Indiana on local community needs, challenges, and opportunities. The advisory group will ensure the school director is in tune with the local community environment.

The advisory group will consist of 6-10 members and include relevant stakeholders in The Excel Center West Central Indiana's student success, drawing on expertise from postsecondary institutions, community groups, K-12 education, government/public policy, and business. These groups will also include teachers and students (either past or present) to ensure that students have a voice in the feedback of school operations. The school director will be responsible for convening and managing the relationship between the school and the advisory group. As needed, the school director will involve the GWE Board in the advisory group and provide updates to the board as necessary.

School Leader

Mr. Carl W. Conwell has been selected to lead The Excel Center West Central Indiana. Carl brings a wealth of knowledge and experience to the role, as well as a deep passion for serving students who have not experienced success in traditional education settings. Carl previously served as the assistant principal and a teacher at Holy Cross School at Gibault. Carl spent six years in the classroom and two years on the administrative team. During his time at Holy Cross, he gained experience in working with non-traditional student populations who were at a multitude of learning levels. Conwell helped the school adopt a new reading curriculum that led to improved reading scores across campus. He also worked to remove barriers for these students as many came in several grade levels below where they should have been or were dealing with various forms of trauma. He became well-versed in meeting students where they are academically.

Conwell gained experience in leading a school building, managing teachers and education staff, and working with them to improve student learning. Conwell has earned bachelor's degrees in Marketing and Social Science Education as well as a master's degree in School Administration and Supervision from Indiana State University. He currently holds a license in Building Level Administration as well as a teaching license in History Perspectives, Geographical Perspectives, Economics, Government for Middle and High School, and Mathematics for grades 5-9. Conwell spent time as a Wraparound Facilitator at a local mental health services provider helping families find resources in the county where they lived. The skills learned in those positions make him uniquely qualified to serve as the director of The Excel Center West Central Indiana.

The leadership team of The Excel Center of West Central Indiana will be responsible for the day-to-day operations of the school. The school director will act as the instructional leader of the school, providing hands-on leadership in directing, planning, managing, and coordinating the educational goals and vision of the school. The school director will ensure that the school curriculum is taught effectively and that the school is meeting desired outcomes. Specific responsibilities include:

- Developing strategies, goals, and objectives to promote student success and managing the implementation of these objectives,
- Monitoring monthly budgets to drive conclusions about students, staffing, and building needs,
- Assisting instructors in setting priorities, facilitating meetings, and developing their leadership skills,
- Maintaining compliance with all student data reporting requirements,
- Providing leadership in the development of new partnerships and/or methodologies in response to the changing needs concerning students, test results, and/or Indiana Academic Standards, and
- Representing the school, as appropriate, in the local community.

The school director will oversee the leadership team of the school, whose responsibilities are listed below in the school leadership team section.

Leadership Accountability

While Carl Conwell is currently involved in the founding of the school, he has not had extensive relationships with board members prior to the summer of 2023. Despite this personal connection to the founding of The Excel Center West Central Indiana, the board will hold Conwell accountable to high standards to ensure a high-quality educational experience for students. The entire GWE Board will review student performance data throughout the school year. Meredith Osburn, who sits on the GWE Board, will evaluate the school director based on his performance on the school director evaluation rubric, the attainment of school performance goals, and an annual performance and development review. If necessary, the school director will be placed on a performance improvement plan and terminated if improvement does not occur.

School Leadership Team

Carl Conwell is the only member of the leadership team who has been identified at this time. The Excel Center of West Central Indiana plans to follow similar leadership models as other Excel Center locations across the state. Therefore, other key leadership positions at the school will include the lead teacher, lead coach, and college and career readiness (CCR) specialist. The timeline for hiring these key roles is 3 months prior to the school opening.

Lead Teacher. The lead teacher will be responsible for overseeing and supporting instruction within the school. They will provide hands-on leadership and academic guidance to teachers and support staff and work effectively across the school to make certain that students are supported in a way that ensures success with both academic and personal goals. Essential functions include:

- Supervises and manages teaching staff;
- Identifies internal and external academic support resources;
- Provides academic and curricular leadership to the school; and
- Oversees the curriculum and alignment to network curricular materials.

Lead Coach. The lead coach will be responsible for overseeing and supporting the life coach team within the school. They provide support for the life coach team and work closely with the CCR specialist. Essential functions include:

- Creates student schedules;
- Supports barrier relief for students; and
- Supervises and manages life coach staff.

College and Career Readiness Specialist. The CCR specialist is responsible for overseeing all programming related to post-secondary readiness, including scheduling industry certifications and dual-credit college courses. Additionally, the CCR specialist teaches the Senior Seminar class to ensure graduates are prepared with the post-secondary skills and plans they need to succeed beyond The Excel Center West Central Indiana. Essential functions include:

- Supervises and manages certification providers and dual credit instructors;
- Connects students with areas of interest and post-secondary career options; and
- Provides instruction around post-secondary planning and preparation.

Hiring the right leaders for The Excel Center of West Central Indiana will be a critical component to successfully opening the school. Staff recruitment will be managed by the school director and supported by the Human Resources (HR) team at Goodwill. Leadership team members will be selected after an array of interviews with the school director, GEI team, and potentially board member interviews pending the board's availability. Interviewers will assess whether that candidate has the required grasp on instruction, fits the organizational culture, and has the emotional intelligence to serve students at the school. As soon as the school is approved to open, The Excel Center of West Central Indiana will begin the hiring process for these positions, with a goal of having these roles filled as early as 3-months prior to school opening.

Decision-Making Authority

GWE does not intend to contract with an Education Services Provider, however, GWE will maintain a close relationship with other organizations operating The Excel Center model in Indiana to work together to serve adults seeking their high school diplomas in the most effective ways possible. This will include ensuring seats allocated for The Excel Center are filled, joining training sessions, positional mentoring, engaging in data-informed problem-solving sessions, and more. The GWE board will have ultimate governing authority over the school, however, the everyday functions of operating the school will be the responsibility of the school leadership team.

Curriculum: The curriculum will be developed and selected at the school level. The school leadership team will be responsible for implementing curriculum in alignment to Indiana state standards and expectations and teachers will be afforded the autonomy to enhance and develop supplemental materials that assist with curriculum delivery.

Culture: It is the responsibility of the school leadership team to implement the culture of The Excel Center West Central Indiana. The school director will provide support, guidance, and best practices to the lead teacher, lead coach, and CCR specialist to ensure that the culture of each school is consistent with the mission of The Excel Center of West Central Indiana and optimizes the learning environment for adults.

Performance Goals: School performance goals will be set based on charter goals and school accountability measures. The governing board will approve all school performance goals. The school leader will be responsible for meeting performance goals and setting internal goals to ensure overall goals are being met.

School Policies: The school director will present draft school policies to the board, who will have the final approval power over such policies. The school director will then be responsible for following and implementing the policies approved by the board.

Recruitment & Hiring: Staff recruitment and screening will be supported by Goodwill's HR team, but school staff hiring decisions will be made at the school level.

Community Relations: It is the responsibility of the school director to ensure positive and productive relationships within the community. The Excel Center of West Central Indiana will have an advisory group to ensure that the school is providing a relevant educational program that meets the local community's needs. The Board will support with development of positive community relationships and will take on the primary responsibility of developing state-wide relationships and articulating the mission and vision of the schools to a broader audience and stakeholders.

Facilities Management: Facilities management will be the responsibility of the school director, who will be supported by the Goodwill facilities team.

Contracting & Procurement: Contracting and procurement will be the responsibility of the school director and will be supported by Goodwill in order to leverage operational efficiencies.

Budget, Finance & Accounting: Budget, finance, and accounting is the primary responsibility of the school leader. Budget development is an iterative process that incorporates input from key stakeholders. The annual budget will be developed each year by the school director with support from Goodwill's finance team. The budget will then be presented to the Board for review, modification as necessary, and approval.

Section II: School Design

Innovation

The Excel Center school model was specifically designed to serve adults and therefore incorporates a number of innovative elements that are effective for adult learners. The Excel Center of West Central Indiana will follow this model, while also tailoring specific aspects of the school to meet the unique needs of students from the Terre Haute area of the state. The Excel Center of West Central Indiana intends to build on the success of The Excel Center campuses operated by GEI and Goodwill Leads while also ensuring the local community needs and voices are represented at the school. Some of the evidence proving the effectiveness of The Excel Center school model comes from The Lab for Economic Opportunity (LEO) at the University of Notre Dame. LEO completed a quasi-experimental study on the effectiveness of The Excel Center. The study found:

- Higher college enrollment: Excel Center graduates are more likely to enroll in college,
- Higher employment: Excel Center graduates are 22% more likely to be employed in the formal sector, or by a licensed organization,
- Higher earnings: Excel center graduates see a 39% increase in their earnings after 5 years.³

With its focus on supporting students as they earn diplomas and postsecondary certifications and credits, ICSB will be able to hold The Excel Center of West Central Indiana to the same high standards and accountability metrics as other adult high schools in ICSB's portfolio.

Curriculum & Instructional Design

Like all Excel Center campuses, The Excel Center West Central Indiana's education plan has three main pillars: (1) an academic philosophy that meets the goals and needs of adult students, (2) a concentrated focus on college and career readiness, and (3) a coaching platform designed to help students navigate challenges that may impede their continued educational success.

Basic Learning Environment

Students who have dropped out of school benefit from flexibility within their academic instruction and in the design of

³ Brough, Rebecca and Phillips, David and Turner, Patrick, High Schools Tailored to Adults Can Help Them Complete a Traditional Diploma and Excel in the Labor Market (January 21, 2023). Available at SSRN: <https://ssrn.com/abstract=3840453> or <http://dx.doi.org/10.2139/ssrn.3840453>

their education programs. Students will enroll in The Excel Center of West Central Indiana at various academic skill levels and will need differing numbers of credits in order to earn their Core 40 diploma. In addition, adult students will be balancing their education goals with work and family obligations. To ensure students' needs are met, each student will have their own graduation plan and move at their own pace to achieve learning goals.

The Excel Center West Central Indiana's course offerings will be provided through direct instruction, distance learning, and credit recovery. The environment within The Excel Center of West Central Indiana will be designed to meet adults' learning needs by encouraging them to see the relevance and importance of their education while providing a mature environment for learning and discussion. Students who come to The Excel Center of West Central Indiana with partial credits in courses will be able to complete certain courses via a standards-based online learning program. Students who take a course online will do so either in an onsite classroom with a teacher facilitator or independently with access to an Excel Center of West Central Indiana teacher, who can answer student questions, set goals with students, and track student progress.

Class Size and Structure

The Excel Center of West Central Indiana will establish a learning environment that meets adults where they are academically. Students will participate in fixed-time classes covering key academic subjects in language arts, mathematics, social studies, and science. These courses will build students' skills, cover material aligned to state standards, and allow staff and students to engage with each other. Additionally, many students who come to The Excel Center of West Central Indiana will require significant remediation and special support. For these students, reading, math, and basic skills classes will allow them to build their foundational skills prior to moving to higher-level courses. Classes will include between 15 to 25 students and integrate material from multiple disciplines, allowing students to demonstrate learning standards in an integrated plan that brings together a number of different skills and precedents.

The Excel Center of West Central Indiana will operate a balanced, year-round calendar consisting of 5 eight-week terms. Direct instruction courses will be scheduled Monday - Thursday, leaving Fridays available for tutoring, meeting one-on-one with teachers, making up missed work, or anything else a student may need. Teachers will also have time on Fridays to plan for the next week and participate in professional development opportunities. The Excel Center of West Central Indiana will operate year-round with typical holiday breaks and one week off for students between terms. Course blocks will be 90 minutes or 180 minutes in length and nearly all of the course offerings will be taught via direct instruction utilizing the instructional approaches outlined below. Students who enroll in The Excel Center of West Central Indiana will have the freedom to choose morning, afternoon, evening, and limited online classes.

Curriculum

The Excel Center of West Central Indiana intends to adopt the same curriculum used at GEI and Goodwill Lead's Excel Center campuses and use this academic content throughout its coursework and lesson plans. This curriculum was designed by yearlong, multidisciplinary committees and is aligned to Indiana Academic Standards. The committees were made of teachers, lead teachers, and school directors who were interested in and had a specialized skill set in curriculum development. The committees went through the process of examining state standards for academics, social-emotional learning, employability skills, and justice skills, including diversity, equity, and inclusion. After identifying standards, the committees began creating a vertical articulation of skills per content area, aligning standards to appropriate skill levels, and course progression. Once the vertical articulation was established and course standards were assigned, the committee created a curriculum map containing academic, employability, social-emotional learning, and justice standards, a pacing guide, a choice board of final assessments and unit assessments, and a standardized scoring rubric. At each stage in the process, the resources were vetted and adjusted by the network of teachers using the curriculum at GEI's schools.

Curriculum maps are aligned to the Indiana Academic Standards and the Indiana Academic Standards for social-emotional learning and employability skills. Additionally, the curriculum maps are aligned with the justice-informed standards adopted from New York. These standards include diversity, equity, and inclusion and are embedded into each course in the curriculum. The Excel Center of West Central Indiana teachers will use the curriculum maps and lesson plan exemplars from GEI to create the materials for their day-to-day lessons, ensuring they will support students in reaching

mastery of the standards. These lesson plans will be reviewed by the school director and lead teacher. The Excel Center West Central Indiana's curricular format, instructional methods, and class structure will provide teachers ample opportunity to build off of what works while also adapting to the unique needs of the students.

The curriculum has two overall goals: 1) teach the necessary content and skills to ensure students meet the requirements of the Indiana Graduation Pathways and 2) develop proficiency in the technical and employability skills required to be successful in modern careers. The objective of the curriculum is to ensure that specific skills are taught and mastered in a timely manner and in ways consistent with Indiana College and Career Ready Academic Standards. The school will blend coursework in engaging and interesting ways that also allow students to learn what interests them and master the necessary content. Instead of distinct grade levels, The Excel Center of West Central Indiana will use mastery to determine if a student is eligible to enroll in courses.

Use of Technology

The Excel Center of West Central Indiana will be intentional about the use of technology to ensure students graduate with the digital skills needed to be successful in the workplace and postsecondary environments. This includes learning how to successfully navigate websites and follow proper technology procedures. Students will utilize Google applications such as Gmail, Google Docs, Google Slides, and Google Classroom to communicate with their teachers, collaborate on group projects, and complete assignments. Teachers will also utilize a variety of web-based supplemental materials to aid in students' technology skills development. Examples of this could include programs like Nearpod, Burlington English, NewsELA, Read Theory, or IXL. Opportunities to use technology will be woven into the core content of The Excel Center of West Central Indiana courses.

Staffing With Highly Effective Teachers

The Excel Center of West Central Indiana will hire licensed teachers for all core content classes. In some instances where a teacher is teaching outside of their content area, they will be heavily supported by the lead teacher or a core-content teacher. For example, it is possible that a licensed English teacher will teach remedial math courses and will do so with the support of a licensed math teacher. If any teachers hired at The Excel Center of West Central Indiana choose to seek additional licenses or endorsements, they will work with the lead teacher to ensure compliance with Indiana state licensure requirements.

Evidence-based Support

The Excel Center of West Central Indiana intends to follow the school model that has been successfully operating in Indiana for the last 13 years and has significant evidence that it meets the educational needs of adults. The foundation of The Excel Center school model's curricular approach is found in the following: *Developing Critical Thinkers: Challenging Adults to Explore Alternative Ways of Thinking and Acting*, *Mentoring Adult Learners: A Guide for Educators and Trainers*, and *Mentor: Guiding the Journey of Adult Learners*.

Additionally, many factors that make adult students unique necessitate specific support to ensure students are successful. The Excel Center model has incorporated the following best practices into its model, as recommended by Complete College America

- *Use block schedules with fixed and predictable classroom meeting times.* The Excel Center West Central Indiana's classes will operate for at least 90 minutes each day, with fixed student schedules for each term.
- *Allow students to proceed at a faster pace, with shorter academic terms, less time off between terms, and year-round scheduling.* The Excel Center West Central Indiana's year-round calendar will take minimal breaks and operate on five 8-week terms.
- *Simplify the registration process.* Students will enroll in the program during orientation and receive substantial help from coaches, teachers, and other staff to understand their path to earning a high school diploma and certification and/or college credits.
- *Form peer support and learning networks.* Students will build relationships with other students and teachers in The Excel Center West Central Indiana's small school environment. In addition, coaches will work to ensure that students remain engaged in the school's academic program and feel like they belong in the school's culture.

- *Embed remediation into the regular educational design, so that students do not waste time before they start earning credits.* Foundational math and English courses will allow students to earn elective credit, helping students connect their remedial work to the goal of earning credits towards their high school diploma.⁴

The Excel Centers around the country have demonstrated that this model is effective in engaging adults who have dropped out of school and leading them to earn high school diplomas and beyond. There are now 40 Excel Centers throughout the country, serving thousands of students. There have been over 11,000 Excel Center graduates since the school first opened in 2010. Of those graduates, the majority have earned an industry certification and/or have earned at least three college credits at the time of graduation. The Excel Center of West Central Indiana anticipates its students achieving equally great success.

Instructional Strategies

The Excel Center of West Central Indiana plans to implement the same successful instructional strategies that The Excel Center school model has been using for over a decade to successfully serve adult students. This individualized and self-directed approach, with the help of the school's life coaching model, will encourage students to develop the initiative to use the school's various resources in the way that best fits their unique needs. However, teachers and coaches will monitor and meet with students regularly to provide encouragement and keep students' motivation high. They will also meet regularly to discuss a student's academic progress. Teachers will structure the classrooms using the gradual release of responsibility instructional approach in which teachers deliver and students interact with new content in a sequence of whole group, teacher-facilitated small group, student-driven small group, and finally independent student practice.⁵ The goal of every course will be independent student mastery of the content, skills, and standards to which the course is aligned.

Adult high school students, require teacher and peer support as they practice toward independent mastery, which will be reflected in the structure of the class. The gradual release of responsibility instructional approach begins with the teacher modeling the new task, "I do;" followed by "We do it together," in which the teacher facilitates as groups of students work through the task, often taking turns coming to the whiteboard to model their thought processes. The teacher's role is reduced more during a student-driven, small group phase of the learning, "You do it together," when students facilitate one another's learning with the teacher present as a consultant, posing inquiry questions to students rather than giving answers. Finally, student-independent practice leading to independent mastery occurs during the "You do it alone" phase of the lesson. All of The Excel Center of West Central Indiana lesson plans will explicitly incorporate the gradual release of responsibility instructional strategy and its four phases.

Curriculum and instructional design center around a metacognitive framework that focuses on four dimensions: knowledge-building and cognitive, personal, and social skill-building which ensures that students acquire the schema necessary to build the critical thinking skills needed to comprehend and interact with new content.⁶ In all courses, teachers will utilize modeling and speaking metacognitively about the academic tasks. Adult students who have not experienced success in high school often require instruction on how to approach math problems, how to make sense of a complex text, and how to more deeply engage with the learning process.

Based on data obtained from existing Excel Centers, it is clear that poor literacy skills hinder the academic success of adult learners, an effect compounded for English language learners. Data collected from the existing Excel Center

⁴ Complete College America (2011). *Time is the Enemy: The surprising truth about why today's college students aren't graduating ... and what needs to change.* Washington DC: Complete College America. Retrieved from http://www.completecollege.org/docs/Time_Is_The_Enemy.pdf

⁵ Fisher, D., & Frey, N. (2008). *Better learning through structured teaching: A framework for the gradual release of responsibility.* Alexandria, VA: Association for Supervision and Curriculum Development.

⁶ Vygotsky, L.S. (1978). *Mind in society: The development of higher mental processes.* M. Cole, V. John-Steiner, S. Scribner, & E. Souberman (Eds.). Boston, MA: Harvard University Press.

campuses as well as scientifically-based research performed by the U.S. Department of Education⁷ indicate that explicit instruction in disciplinary literacy strategies positively affects reading comprehension and student self-confidence.⁸ Therefore, The Excel Center of West Central Indiana teachers will embed disciplinary literacy strategies into all areas of curriculum and instruction, making it clear to students how an expert reader of a particular discipline reads and makes meaning of texts. Incorporating disciplinary literacy strategies with the gradual release of responsibility model requires extensive teacher modeling, leading to independent student mastery. Students will move through the course progression upon successful completion of a course and proof of mastery over the material.

Teachers will plan for differentiation and include differentiation strategies in all lesson and unit plans in order to accommodate the learning styles and needs of all students. Based on student needs, differentiation strategies employed in The Excel Center West Central Indiana's classrooms may include using vertical text sets, student choice, heterogeneous and homogeneous grouping, parallel tasks, and incorporating opportunities for multiple learning modalities. Vertical text sets will provide opportunities for students to read standards-aligned content at reading levels that match or slightly stretch their reading level. In addition to vertical text sets, students will continue to interact with complex disciplinary texts, practicing vocabulary acquisition and improving reading comprehension skills. The gradual release of responsibility instructional strategy includes a great deal of cooperative group work, and teachers must select strategic grouping techniques to maximize instructional time and provide for differentiation. For example, during a teacher-facilitated small group rotation, teachers select homogeneous grouping to allow for time to work with students of similar abilities, while during student-centered small group work time, heterogeneous grouping allows students to leverage peer expertise.

Core Curriculum Scope and Sequence

Please see Attachment 3 for The Excel Center West Central Indiana's core curriculum scope and sequence

Calendar

A key strategy to support student success is the accelerated pace of The Excel Center West Central Indiana's academic program. As noted above, for many adult learners, the lengthy time frame needed to progress through an academic program is a major detriment to lasting success.⁹ The Excel Center of West Central Indiana will operate four periods each day, each period consisting of 90 minutes of instruction. Each day of fixed-time instruction provides 450 minutes, or 7.5 hours, of instructional time available for students. Each week includes 30 hours of fixed-length instruction. On Fridays, students will participate in self-directed learning by meeting with their teachers, and coaches or participating in group tutoring. This provides for 154 direct instructional days and 39 self-directed learning days for a total of 193 school days. Please see Attachment 4 for The Excel Center West Central Indiana's proposed calendar.

Virtual Instruction

There will not be a set number of hours per day that students will participate in virtual instruction. The majority of courses will be in-person and direct instruction. Online credit recovery classes will only be available on a limited and as-needed basis. Distance learning classes will be available to students who are in The Excel Center of West Central Indiana and have support from a teacher. Students will not be able to participate in distance learning from locations outside of the school building such as their home. The Excel Center of West Central Indiana will not meet the definition of a virtual charter school as defined under Indiana Law.

Pupil Performance Standards

⁷ U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, What Works Clearinghouse (2010). Reading Apprenticeship ®: What Works Clearinghouse intervention report. Retrieved from <http://ies.ed.gov/ncee/wwc/interventionreport.aspx?sid=414>

⁸ Lesmeister, M. B. (2010, February). CTE and literacy: Teaching adults to read with Reading Apprenticeship. Association of Career and Technical Education, Techniques. 28-32.

⁹ Complete College America (2011). *Time is the Enemy: The surprising truth about why today's college students aren't graduating ... and what needs to change*. Washington DC: Complete College America. Retrieved from http://www.completecollege.org/docs/CCA_national_EMBARGO.pdf

Just like other adult high schools throughout Indiana The Excel Center of West Central Indiana does not plan to use distinct grade-level classifications with students but will classify them using grade-level for required Indiana Department of Education reporting. Students will have their individual graduation plan that outlines the courses and requirements they need to complete in order to earn their high school diploma. This model allows students to matriculate through the course progression at an accelerated pace from a traditional high school and allows staff to ensure students are mastering the skills in each class.

Academic Exit Standards are included in Attachment 5

Grade Promotion

Students at The Excel Center of West Central Indiana will earn credit by successfully demonstrating mastery over the standards established in each course. Teachers will be responsible for assessing mastery by monitoring student work and evaluating their work against the Indiana Academic Standards. Each class is mapped to indicate which credits count towards a Core 40 diploma and some classes integrate credits from multiple domains. Students will earn credit by demonstrating satisfactory completion of a course and earning a passing grade of a D or higher in that course. Since The Excel Center of West Central Indiana will be serving adult students, promotion and graduation criteria will not typically be shared with parents, unless the student has a legal guardian. Instead, every term, students will meet with their coach to review their individual graduation plans and ensure students understand the requirements they still need to fulfill in order to graduate.

Graduation Requirements

Students at The Excel Center of West Central Indiana will be required to fulfill the graduation requirements for the State of Indiana in order to earn their Core 40 high school diploma. These requirements will be adjusted as needed in order to match state-level requirements. Students must meet the criteria outlined in the Indiana graduation pathways including 1) earning credits required to earn a Core 40 high school diploma, 2) learning and demonstrating employability skills, and 3) postsecondary-ready competencies

The Excel Center of West Central Indiana will offer the following coursework required to earn the Core 40 diploma.

- English / Language Arts: 8 Credits
- Mathematics: 6 Credits
- Science: 6 Credits
- Social Studies: 6 Credits
- Directed Elective: 5 Credits
- Physical Education: 2 Credits
- Health and Wellness: 1 Credit
- General Electives: 6 Credit

Students will demonstrate mastery over the standards for each course by earning a passing grade of a D or higher. Student transcripts from other schools will be reviewed to determine if any coursework completed prior to enrolling at The Excel Center of West Central Indiana also applies to the Core 40 diploma requirements. Students will also be able to earn credit by enrolling in dual-credit programs and industry-certification classes.

Using the same calculation methods as other Excel Center campuses, The Excel Center of West Central Indiana student grade point averages (GPA) will be calculated based on the grades that students earn in each course, using the scale below. GPAs will be averaged based on the points earned for each credit. In courses that award multiple credits, the student’s letter grade will apply the same point for each of the credits earned.

GPA Calculation	
Letter Grade	Points Per Course
A	4.0

A-	3.667
B+	3.333
B	3.0
B-	2.667
C+	2.333
C	2.0
C-	1.667
D+	1.333
D	1.0
D-	0.667
F	0 points

To ensure students learn and demonstrate employability skills, all Excel Center of West Central Indiana students will take Senior Seminar, a course aligned with the Career Ready Practices Standards. This course will incorporate career exploration, as well as a foundation of skills important to workplace success. As part of the Senior Seminar, students will engage in a capstone project that will meet the requirements for a Project-based learning experience or students will have the option to choose Service or Work-based learning experiences. Students will master the skills required to earn one credit in Career Exploration and one credit in Preparation for College and Career in the Senior Seminar course.

All students at The Excel Center of West Central Indiana will complete at least one of the Postsecondary-Ready Competencies required by graduation pathways. It is expected that the majority of students will earn either an industry-recognized certification and/or dual credits, however, students will be able to complete the competency that aligns best with their chosen pathway. Early in their enrollment at The Excel Center West Central Indiana, students will take a career interest and exploration assessment and work with a life coach and college and career readiness specialist to identify a career goal. This career goal will form the basis of the student’s graduation pathway. The Excel Center of West Central Indiana plans to partner with Ivy Tech Community College to ensure that students earn transcribed, transferrable credits through applicable coursework.

Industry certifications offered through The Excel Center of West Central Indiana will include those in the areas of Health Sciences, Information Technology, Manufacturing and Transportation, Distribution and Logistics. The list of offerings will be evaluated each year against the approved list from the Department of Workforce Development. Examples of offerings include:

Industry	Health Sciences	Information Technology	Manufacturing	Transportation, Distribution, and Logistics
Industry-Recognized Certifications Offered	<ul style="list-style-type: none"> • Emergency Medical Technician (EMT) • Pharmacy Technician (CPhT) • Certified Nursing Assistant (CNA) • Certified Medical Assistant (CCMA) • Medical Billing and Coding Specialist 	<ul style="list-style-type: none"> • IT Fundamentals • Microsoft Office Specialist (MOS) • QuickBooks 	<ul style="list-style-type: none"> • American Welding Society Certification • NCCER Core Construction 	<ul style="list-style-type: none"> • MSSC Certified Logistics Technician • Commercial Driver’s License (CDL)

The Excel Center of West Central Indiana will offer general elective credits through remedial courses and woven into other classes as part of its accelerated curriculum. Directed elective courses will be offered through coursework that is part of students' selected college and/or career pathways. The electives represent a common benchmark for what students should know and be able to do after completing a program of study in a career pathway, ensuring that students have the knowledge, skills, and dispositions that are critical to becoming career ready. Examples of directed elective courses include Senior Seminar, Financial Foundations, and industry certifications as aligned to the IDOE high school course titles and descriptions.

The Excel Center of West Central Indiana will create electronic transcripts and use the common data fields as required by Indiana Code. This will include attendance records that reflect the time period, in terms, during which the student was enrolled at the school, and the record of courses taken and credits earned. Transcripts will also include the student's performance on standardized testing from any point in their high school career, including GQE, ECA, ISTEP, ACT, and TABE scores. All postsecondary certificates and dual credit courses will also be included in the student transcript.

The Excel Center of West Central Indiana does not intend to implement any graduation requirements that exceed those required by the state of Indiana. The graduation requirements described above will ensure students are prepared for college or other postsecondary opportunities by allowing students to practice the skills needed to be successful in postsecondary learning environments while still supported by their Excel Center of West Central Indiana teachers and coaches.

The Excel Center of West Central Indiana will rely on coaches to support all students, but especially those students who are at risk of dropping out or not meeting their graduation requirements. Coaches will communicate with students and be responsible for keeping them engaged in the school. This may include helping students navigate non-academic challenges that are making it hard to progress through The Excel Center West Central Indiana's education program. Coaches will ensure students are placed in the appropriate courses in order to ensure they meet graduation requirements.

Special Populations and At-Risk Students

The structure of The Excel Center West Central Indiana's academic plan is to provide the appropriate instructional methods to meet each student's unique needs, and teachers will differentiate instruction for all students in all classrooms. This structure allows students from special populations, such as those with a disability or English Language Learners, to receive the support needed to earn a high school diploma.

Summary of Services to Special Student Populations

The Excel Center of West Central Indiana will adhere to all state and federal laws in order to serve special student populations. The school will build on the learning and experience from other Excel Center campuses to create a learning environment that is welcoming to all students. The school expects to serve students in all of the special populations summarized below.

Students with IEPs and Section 504 Plans

The Excel Center of West Central Indiana anticipates it will serve a population of students who qualify for special education services through Individualized Education Plans (IEPs) and/or Section 504 plans. Based on information from currently operating schools, most Excel Center students with disabilities spend the majority of their instructional day in their least restrictive environment (LRE), participating in fixed-length classes alongside the general student population. In addition to ensuring students are in their LRE, the school will provide all the resources necessary for students to utilize supplementary services and/or accommodations as indicated in their IEP or Section 504 plan. The Excel Center of West Central Indiana will hire qualified special education staff who will be responsible for implementing the school's special education program including 1) identification of eligible students, 2) implementation of IEPs and Section 504 plans, 3) Staff coordination and professional development, including organizing move in and case-conferences, 4) evaluating and monitoring student progress and ensuring appropriate school leadership are aware of student data.

English Learners

The WIDA English Language Development (ELD) Standards have been incorporated into the curriculum of The Excel Center of West Central Indiana plans to adopt to ensure that students who are not fluent in English can learn English and the academic content. The Excel Center of West Central Indiana will have a comprehensive plan in place to serve English Learners (EL). The plan will start with identification using the Home Language Survey, WIDA-ACCESS, EF SET Standard Test, and Lexile score assessment. Students who are identified as qualifying for EL services will have access to English Immersion classes, additional instruction, Burlington English, and other resources to support their acquisition of the English language. EL students' English proficiency will be regularly assessed to ensure growth. As part of its comprehensive plan, The Excel Center of West Central Indiana will ensure its EL program is fully resourced and appropriately monitors its effectiveness. The school will hire an EL Coordinator or Teacher of Record licensed to provide EL services.

Intellectually Gifted Students

To accommodate the range of student skill levels, aptitudes, and backgrounds, The Excel Center of West Central Indiana will offer flexible coursework, such as 8-week terms, small group instruction, remediation, certification courses, and individualized attention. The goal will be to give each student a realistic and attainable path to educational success and sustainable employment. This structure will allow all students to receive appropriate support including those who are intellectually gifted. To serve such students coaches will encourage them to take as many classes as possible during one term and to enroll in rigorous dual credit and industry-certification courses. The relevance of a high school education that leads to valuable career and dual-credit options for postsecondary education increases the chance for employment success for anyone regardless of skill level or ability.

Students Below Grade Level or At Risk of Dropping Out

During orientation, all students enrolling in The Excel Center of West Central Indiana will take diagnostic assessments; the results of which, combined with a review of previous high school transcripts, will determine course placements. The Excel Center of West Central Indiana intends to use Edmentum, a nationally recognized diagnostic program with adaptive assessments that begin at a sixth-grade level and progress the student forward or backward to best determine the student's current academic level. The assessments are tied to Indiana Academic Standards and use Lexile and quantile scores to represent student level of skills. After taking the placement assessments, students will be placed in courses that are aligned with their current academic levels. At other Excel Center locations, approximately 70% of students who enroll test below 6th grade in math and 45% test below a 6th-grade reading level. Students who are below grade level are placed in remedial courses specifically designed to bring adult learners up to the secondary level.

Serving Students with Disabilities

The Excel Center West Central Indiana's individualized approach allows students with disabilities to receive appropriate support, with their own IEPs or Section 504 plans. In alignment with the mission of serving adults who previously dropped out, The Excel Center of West Central Indiana will comply with all state and federal laws regarding serving students with disabilities.

Identification - Students with Disabilities

The Excel Center of West Central Indiana will comply with IDEA Child Find activities for all students who enroll, including identifying and providing appropriate special education services. The Excel Center of West Central Indiana will focus on identifying and serving those who qualify as students with disabilities under federal and state criteria. When a student first completes paperwork to enroll in The Excel Center of West Central Indiana (name, contact information, date of birth, previous schools attended, etc.), students will be asked to identify whether they have ever received special education services or Section 504 services at previous schools. If students indicate that they have previously received services, then the school staff will contact students' previous schools to receive copies of IEPs or Section 504 plans.

In addition to these preliminary efforts, students will be asked again whether they have received special education services or Section 504 services during new student orientation. Students who previously had IEPs or Section 504 plans will participate in a move-in conference where the special education coordinator (who will also serve as the Teacher of

Record) will examine the students' previous placements and least restrictive environments (LRE) and discuss with students where they experienced successes and struggles to determine the LRE appropriate at The Excel Center West Central Indiana.

The Excel Center of West Central Indiana staff will initiate the evaluation process for all students who self-identify as needing special education services or who staff identify as needing services. These evaluations will be used to help the case conference committee, consisting of the special education coordinator, teachers, coach, and student, make informed decisions regarding educational services for students. In order to initiate an educational evaluation, the school, guardian, or student must make a request, written or verbal, to evaluate. The guardian and/or student must provide written consent for the evaluation to begin.

The following outlines the procedures for after a request has been made:

1. Complete appropriate forms in IndianaIEP
2. Contact the contracted school psychologist and provide the following information:
 - a. Name
 - b. Age
 - c. Gender
 - d. Date of birth
 - e. School Name and Address
 - f. Areas for evaluation
3. Complete social development history, teacher report form, student report form
4. Scan all forms to the school psychologist
5. Work with the school psychologist to set up times for testing
6. After evaluation testing is complete and the final report is ready, schedule the case conference

After a written request has been made, the evaluation team must complete the evaluation and hold a case conference within 50 instructional days. The evaluation team may include:

- General education teacher
- Special education coordinator
- Contracted school psychologist
- Contracted speech/language pathologist
- Coach
- Related service providers
- Guardian
- Student

The special education coordinator will write IEPs for students with special education needs and will be responsible for notifying instructors, coaches, and other school staff of students' specialized plans. The special education coordinator will work with teachers and coaches to ensure that students receive appropriate services that enable them to stay on track to graduate.

Instructional Program and Strategies - Students with Disabilities

As part of The Excel Center model, life coaches will help students manage their learning plans and check in with students to monitor their progress. In addition to coaching services, students with special education needs will be supported by an IEP or Section 504 plan and specialized learning environments structured to fit their unique needs. All general education curriculum and school activities will be available to students receiving special education services unless otherwise noted in the student's IEP and/or Section 504 plan. Students receiving services will spend the majority of their instructional day

participating in fixed-length classes alongside the general student population. For the remainder of the day, they may use supplementary services as indicated in their IEP and or Section 504 plan.

The special education coordinator will be responsible for ensuring that students' IEPs and Section 504 plans are being implemented with fidelity and revised as needed. Each student will receive individualized academic and behavioral planning and services in their LRE. The Excel Center of West Central Indiana will provide students with disabilities with a variety of other services if needed. The majority of these services will be contracted by the school on an as-needed basis and include speech and language therapy, occupational therapy, and/or physical therapy.

The Excel Center West Central Indiana's special education coordinator will also serve as a Teacher of Record (TOR), certified to teach special education and demonstrate understanding of the unique needs of students with disabilities and special needs. The special education coordinator will meet regularly with students to facilitate their learning and monitor progress against IEP and/or Section 504 plan goals and objectives. Strategies may include one-on-one instruction, remediation techniques, self-paced lessons, and computer-based tutorials. Behavior modification supports and techniques will also support building social skills and work-related skills to help remove barriers to school performance and job success. Behavior modifications may include coping strategies, social stories, anger management, etc. Students may use specific technology such as Read and Write Gold's speech-to-text conversion devices or calculators. Students may be allowed to use vertical text sets or receive additional time on exams. In some instances, a special education staff member may push into the class to assist students individually or in small groups, and all students will have access to tutoring sessions on Fridays and before and after school.

All accommodations for students with disabilities will be put in place to allow students better access to the general education classroom and curriculum. The special education coordinator will use a student-centered approach to tailor learning/service strategies and will be expected to employ creativity and innovation in educational approaches. To that end, the special education coordinator will receive ongoing professional development related to best instructional practices to use when working with students with disabilities. Coaches and the special education coordinator will work closely as a team to facilitate learning plans for students with IEPs or Section 504 Plans.

Evaluate and Monitor Progress - Students with Disabilities

The special education coordinator will be responsible for evaluating and monitoring the progress of students with disabilities as it relates to their IEP. The special education coordinator will track the attendance, test scores, and credit attainment of students with disabilities on a weekly basis. Using this data, the special education coordinator will meet regularly to discuss progress with students and teachers and implement interventions as needed. Every term, the school director and special education coordinator will do a data review of all students with IEPs or Section 504 plans to monitor their progress. Annually, the special education coordinator will organize a case conference to discuss student progress with the student, teachers, coach, school director, and family (if applicable).

In the rare cases in which The Excel Center of West Central Indiana cannot serve as a student's LRE, the case conference committee will determine a plan to ensure the student's success is provided in an alternative environment. Any determination to change a student's placement will be a decision reached by the case conference committee. The decision will be made in instances where a student has a repeated history of being unsuccessful in the current placement and is not making progress toward the goals outlined in the student's IEP. Such alternatives might include a shorter day or using an online curriculum with the support of the special education coordinator. Each IEP will be created with the individual student in mind, and each student will play an active role in the implementation of their IEP.

Graduation - Students with Disabilities

All students will be encouraged to work towards a Core 40 diploma. In the event a student is unable to pass core classes and/or meet the requirements of graduation pathways, despite all available interventions, and after a case conference with the student and family (as applicable), students will be permitted to seek a General Education diploma. To complete The Excel Center of West Central Indiana graduation requirements, General Education diploma recipients must also earn a work-related certification that will improve lifelong employability.

As part of the curriculum in every class and through interactions with peers and staff, students at The Excel Center of West Central Indiana will be provided the chance to learn social skills and job skills needed for the 21st-century workplace. Every student with an IEP will have clearly identified transitional services and activities. These comprehensive transition plans will include educational programming and work-related training that specifically addresses students' needs and career goals. The special education coordinator will incorporate transition assessments into this planning to identify students' interests and aptitudes and to provide support that addresses their postsecondary education or employment goals. The special education coordinator will also work closely with students to access needed support and assistance after graduating from The Excel Center West Central Indiana, including such services as offered by the state's Vocational Rehabilitation Services. Vocational Rehabilitation Services in Vigo and the surrounding counties are offered to specifically assist individuals with disabilities as they seek employment. Vocational Rehabilitation Services may include internships, work skill training, college assistance, job placement, or even soft skill training. Transition services may also include college tours, internship programs, and work skill development, focusing on the individual needs of those with disabilities.

Qualified Staffing - Students with Disabilities

The Excel Center West Central Indiana's special education coordinator will be trained on all applicable policies, procedures, and guidelines set forth by Indiana laws and regulations, IDEA, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act. The special education coordinator will have a special education license and special education teaching experience. Paraprofessionals will be hired on an as-needed basis, based on the number of students that are enrolled in the school and identified for special education services. Paraprofessionals are not part of the planned hires for Year 1 of the school operations.

In addition to the Special education coordinator, there may also be additional staff hired, such as general education teachers, who are dual-licensed in special education and are able to provide another layer of support. In the event of a high population of special education students, additional special education staff will be added. Any paraprofessionals hired will be trained and closely supervised by special education staff.

English Learners

For the 2022-2023 school year, Vigo County Community School Corporation reported a total EL population of 211 students.¹⁰ According to the US Census Bureau, the population of Vigo County is 85.2% White alone, not Hispanic or Latino.¹¹ Based on this data, The Excel Center of West Central Indiana anticipates serving a small population of EL students and plans to have a comprehensive program in place to ensure EL students have full access to school and receive all the state and federal services for which they are eligible.

Identification - EL

During orientation, all students will be surveyed on their home language and if they speak a language other than English at home, students will be assessed for EL services. For students under 22 years of age, they will be assessed using the WIDA screener. For students over age 22, The EF Standard Test will be used to assess English Language Proficiency. These separate assessments for different age groups will be used based on IDOE age requirements. In addition to the WIDA-ACCESS assessment or EF Standard test, students will complete diagnostic testing that measures their Lexile score. The combination of results of these assessments will be how The Excel Center of West Central Indiana identifies EL students.

Instructional Programs, Practices, and Strategies - EL

Any student identified as qualifying for EL services will work with the licensed EL staff to develop an Individual Language Plan (ILP) or EL Accommodation Plan (for students 22+). This plan will outline the specific needs of the student and identify the resources and accommodations the school will provide in order to ensure the student has full

¹⁰ Indiana Department of Education. Corporation Enrollment by Special Education and English Language Learners. Accessed September 13, 2023. Retrieved from <https://www.in.gov/doe/it/data-center-and-reports/>

¹¹ United States Census Bureau. Quick Facts: Vigo County, Indiana. Accessed September 13, 2023. Retrieved from <https://www.census.gov/quickfacts/fact/table/vigocountyindiana/PST045222>

access to The Excel Center of West Central Indiana curriculum. The instructional programs, practices, and strategies The Excel Center of West Central Indiana will provide are

- Immersion Classes: EL students who score below 1000 will be enrolled in a class specifically designed to support the acquisition of the English Language,
- Accommodations in Class: This strategy includes access to bilingual dictionaries, online translation services, bilingual staff (if available),
- Access to Burlington English: A proven foundational English acquisition program, Burlington English was selected because it is a research-based program that is used for remedial reading to help students develop the reading skills necessary to enter into high school-level courses.
- One-on-one or small group instruction:

The Excel Center of West Central Indiana staff will regularly conduct analyses of the success rates with these programs to ensure that the school's instructional resources are meeting students' needs. School staff will connect EL students with the resources they need to learn and remain engaged in schoolwork. Where possible and appropriate, some online content will be available in students' native language, and if bilingual staff are available, they will assist EL students with accessing the school's resources. Additional resources that will be used by EL students include bilingual dictionaries and the full suite of resources available through Burlington English.

Assess and Monitor Progress - EL

The Excel Center of West Central Indiana will have high expectations for EL student achievement and will continuously monitor EL student progress through student work, formal and informal assessments, and test results. Specifically, the school will use WIDA ACCESS to monitor student progress for students under age 22 and the EF standard test for students 22+. If students show through their assessments that they have reached a high enough level of English language acquisition, they will be exited from the EL program.

Qualified Staffing - EL

At least one staff member will be certified as an EL instructor, in compliance with state requirements. This individual will have the responsibility of working with other teachers who teach EL students to ensure they are using best practices in serving this student population. The EL licensed staff member will lead weekly data analysis meetings during which they will review EL student progress. Based on the needs of the teaching staff, modules that assist staff in teaching EL students will be integrated into each professional development day. Additional staff development days will be dedicated to ensuring that all appropriate staff understand all federal laws and regulations related to EL students. Staff will also participate in breakout sessions related to their content areas and understand how to make accommodations and modifications to lesson plans and instructional methods to best meet the diverse needs of all learners. During professional development, teachers will be trained on the WIDA ACCESS and WIDA test standards to track student proficiency in English. Teachers whose students include EL students will plan explicitly for content adaptations, building background knowledge, creating comprehensible explanations and scaffolded learning experiences, and providing opportunities for review prior to mastery assessments to help EL student be successful.

Students Performing Below Grade Level

All students will complete diagnostic testing as part of new student orientation. Students who score below high school level for math and/or English will be placed in remedial courses to provide foundational support to master beginning to intermediate skills. The Math Foundations course will focus on math standards for Grade 6 and the first half of Grade 7. The Pre-Algebra course will resume with the second half of Grade 7 and Grade 8 skills, including a scaffolded spiral curriculum that prepares students for Algebra I. For the English courses, English Foundations 1 will focus on English standards for Grades 5 and 6, while English Foundations 2 will align with Grade 7 and 8 Indiana Academic Standards to prepare students for high school-level English courses.

Each of the foundational courses includes flexibility for the teachers to individualize instruction and tailor the coursework to meet the needs of students. Additionally, teachers will utilize extra support and resources, such as web-based

technology programs focused on individual student needs, manipulatives, graphic organizers, study skills, and project-based learning.

These instructional resources have been used with Excel Center students since 2010, with proven success. Students often enter The Excel Center with zero credits and their reading and mathematics skills are equivalent to an elementary level. These students are able to progress through The Excel Center course offerings utilizing the instructional materials and resources listed above, completing courses, passing standardized assessments, and earning job certifications and dual credits.

Intellectually Gifted Students

The Excel Center of West Central Indiana is committed to meeting the academic needs and life goals of all students, including those who are academically advanced. While students returning to high school often are behind in earned credits, some students are of high cognitive ability. The Excel Center West Central Indiana's teaching staff will identify when students are intellectually gifted and differentiate student learning to keep the student engaged in class. In addition to differentiation, The Excel Center West Central Indiana's core content course progression will allow students who are advanced to pursue dual high school and college credits. Dual credit has been shown to have significant outcomes in improving postsecondary success and high school credit attainment. The Excel Center of West Central Indiana will partner closely with Ivy Tech Community College when preparing students for what's next and providing students with these dual credit opportunities. The Excel Center of West Central Indiana will offer these opportunities at no cost to students.

Virtual Instruction

The Excel Center of West Central Indiana does not intend to rely heavily on virtual instruction. For students who do take virtual courses, accommodations matching their needs outlined in their IEP and/or Section 504 plan will be provided. The special education coordinator will discuss virtual instruction needs with students prior to starting a course and will regularly check in with students throughout the term to ensure the student's needs are met.

Performance Management

Governing Board Monitoring Student Performance

In order to ensure the school is providing a high-quality educational experience to students, the governing board will closely monitor student performance through regular reporting from the school director. Prior to every board meeting, the school director will prepare information for the board including, but not limited to, the following information:

- Student enrollment count - this information will help the board ensure community engagement and student recruitment efforts are effective and help the board gauge the financial health of the school.
- Total credits earned and total graduates - this information will allow the board to monitor student progress toward graduation and ensure the school is going to meet its graduation goals.
- College & Career Readiness - reports will show the percentage of graduates who are also earning industry-recognized certifications and dual college credits. The board will be able to ensure the school is meeting accountability requirements for adult high schools and that students are graduating ready to succeed in their next step.

The board will monitor student performance at a high level, unless the school begins to fall short of the goals set by ICSB, in which case, they would take the actions described below in the relevant section (Falling Short of Expectations)

State Assessments

The Excel Center of West Central Indiana will administer all state-mandated assessments, including state proficiency exams, English Language Proficiency Assessments, and alternative assessments. Additionally, The Excel Center of West Central Indiana will administer regular testing to assess student learning needs and monitor academic growth, beginning with administering baseline placement assessments upon enrollment. Baseline assessments will be used to place students in the appropriate class in The Excel Center West Central Indiana's course progression. Once placed in courses, teachers will use formative and summative assessments that align with the curriculum to monitor student progress and ensure

students are mastering the learning standards. In addition, students who participate in dual enrollment courses with Ivy Tech, or those who are planning enrollment at other post-secondary institutions, will take the Knowledge Assessment test.

Student Data

The Excel Center of West Central Indiana plans to use a data-driven approach to ensure student needs are effectively met and monitor the academic growth of students. Baseline student performance data will be collected during student orientation. All students will complete diagnostic assessments in literacy and mathematics to determine where they should begin in The Excel Center West Central Indiana's course progression.

It is a key priority of The Excel Center West Central Indiana's professional development plan to equip school staff to use and analyze data to improve instruction. Teachers will use information gleaned through data management as a part of the school's plan to improve educational practice. The school director will be responsible for leading data reviews. All teachers will participate in ongoing data analysis throughout the term which will be used to ensure students are receiving high-quality, rigorous instruction. Teachers will learn data analysis techniques and then apply those techniques during weekly data analysis meetings. Additionally, the curriculum analysis, horizontal and vertical articulation of curriculum and assessments, will occur throughout the school year, as part of data analysis work. Poor results on daily exit tickets or assessments will help instructors adjust lesson plans, increase differentiation in their classrooms, and re-teach important material.

The primary focus of The Excel Center West Central Indiana's data reviews will be to equip school staff with the skills needed to understand and interpret their performance data and provide deeper context for their results from the past term. At the end of each eight-week term, the school leadership team will discuss their performance on a number of critical indicators, including:

- Student enrollment
- Student attendance and retention
- Credit attainment
 - Number of credits attempted by subject area
 - Number of credits earned
 - Percent of credits attempted that are earned
- Number of graduates
- Number of students participating in or completing dual credit or certification training

The school leadership team will discuss their performance for the past eight weeks in each of these indicator areas and the factors that led to their current level of performance. Additionally, the leadership team will discuss the steps they will take to address lagging indicators in order to improve the school's performance. The school leadership team will review data on subpopulations within the school to determine if any adjustments to the school design are necessary. For example, if the data shows that the older students with work conflicts are consistently struggling to earn credits, then the school leadership team would explore the addition of evening classes.

Through The Excel Center National Network, the school will have access to data comparing performance across locations, doing deep analysis into why certain schools perform better than others, or suggesting ways to improve performance among special student populations. GEI staff will be able to support the school director with making connections to other schools based on their data performance to troubleshoot and share best practices.

Student Information System

The collection, analysis, and sharing of data will be critical to the success of The Excel Center of West Central Indiana and its students. Data entry will be the responsibility of all staff members at the school. Teachers, coaches, and staff will be responsible for collecting and entering student data for the school. The school director will be the person at the school level who is primarily responsible for leading the analysis of student data. The director will generate reports necessary for leaders to perform ongoing assessments of school performance, highlighting performance across key areas at both school-wide and per-class groupings in the following areas:

- Attendance trends, both between terms and within the term,
- Credit attainment, both in aggregate and on a per-student basis,
- Identifying students who are at risk of dropping out of school. The SIS will provide information to assess student progression from week to week and allow staff to develop interventions to maximize engagement,
- Reports of coaching performance, which identify the academic success of the students who fall within a particular life coach's caseload. These indicators will include the total credits earned within the caseload, the average class attendance, and student credit attainment.

Staff & Leadership Training

It is a key priority of The Excel Center West Central Indiana's professional development plan to equip school staff to use and analyze data to improve instruction. Data from student assessments allow teachers to evaluate student progress and provide opportunities for reteaching to address subjects or areas of concern. Additionally, The Excel Center of West Central Indiana is committed to strengthening efforts around diversity, equity, and inclusion. The school leader will review data metrics that are tied to racial ethnicity, language competency, and more to gauge outcomes and develop strategies to achieve equity. School leaders will be trained to facilitate training to strengthen cultural competency such as Implicit Bias and data analysis training.

Falling Short of Expectations

If The Excel Center of West Central Indiana falls short of the student academic achievement expectations set by ICSB, the first step the school director will take is to review data to determine the root source of the challenges and what strategies should be used for corrective action. Data will be reviewed at the individual, classroom, and school level at regular intervals throughout the school year.

At the individual level, assessment data will be used to monitor student progress. In instances where students are not meeting expectations, school staff will meet to discuss alternate ways of providing supports for students. Strategies the school will implement may include

- Classroom management interventions,
- Increasing the amount of one-on-one attention a student receives,
- Working with the coaching staff to determine if non-academic challenges are affecting students' academic progress,
- Reducing students' course load, or
- Teacher academic interventions

At the classroom level, poor performance often indicates that the teachers have not been successful at delivering instruction that allows students to demonstrate mastery on the state standards. If data indicate students are not demonstrating mastery, then the teacher may be in need of additional supports to improve skills and work. If this occurs, the lead teacher will work with the teacher through observation and coaching to support improved academic outcomes.

At the school level, consistently poor performance may be the result of a number of factors, including organizational culture, poor process orientation, and leadership deficiencies. In cases where a school consistently falls short of expectations, the school director will receive feedback and coaching from other school leaders within The Excel Center National Network. If the school continues to fall short, the governing board may deem it necessary to find new school-level leadership. In this case, the governing board would work to replace the school leadership as quickly as possible to reduce the disruption to the school.

Staffing

The Excel Center of West Central Indiana anticipates enrolling fewer students during the first year of school operations than when at full capacity, therefore the staffing plan reflects growth of the staff as well as the student population over the first few years.

Organizational Chart

The Excel Center West Central Indiana’s Year 1 and full capacity organizational charts are attached as Attachment 6.

Recruiting & Hiring

To hire high-quality staff, The Excel Center West Central Indiana’s initial strategy will be to recruit individuals with a track record of high performance from within The Excel Center network. With 40 schools around the country and 20 within Indiana, there is a deep talent pool from which to draw. In addition to recruiting internally, The Excel Center of West Central Indiana will also use recruitment strategies such as job posting on the IDOE job bank, Goodwill’s website, Indeed, LinkedIn, and other job sites, and attending career fairs at local colleges and universities. The Excel Center of West Central Indiana has already had staff with historically hard-to-hire licenses reach out to ask about the potential for employment. New staff will be selected after interviews with school leadership and peer panels. In addition to the technical knowledge of teaching, graduation requirements, and other education-related information, some of the key selection criteria needed for a successful hire at The Excel Center of West Central Indiana will be

- Building collaborative relationships with colleagues and students,
- Adaptability to maintain effectiveness when experiencing a shift in priorities,
- Informed Decision-making and problem-solving skills, and
- A commitment to continuous improvement.

All offers of employment will be conditional pending a national background check. All employees will be required to work in consort with The Excel Center West Central Indiana’s basic principles and in accordance with the employee handbook. Failure to abide by The Excel Center’s standards of conduct will lead to disciplinary action, including termination of employment. Working with the school director, HR staff will be responsible for sourcing and screening candidates for available positions and also verifying the licensing of all of the teaching staff presented as candidates.

Staffing Plan

The Staffing Plan outlined below is for when the school is fully staffed. This is the same staffing model that has been effectively implemented at other Excel Center campuses across the country. One innovative element of The Excel Center’s staffing plan is the Young Learner’s Child Care manager and attendants. These staff will be specifically hired to ensure students who are parents are able to access excellent teaching provided by teachers at The Excel Center West Central Indiana.

Position	Number	Description
School Director	1	Leader of the School
Manager- Office Administration	1	Administrative duties
Lead Teacher	1	Supports teachers and oversee instruction
Instructors	10	Licensed instructors in Math, Science, Humanities, English, and ELL
Special Education Instructor	1	Teacher of Record, certified in special education
Paraprofessionals	0	Support instruction through small group and one-on-one support (part time)
Lead Coach	1	Supports coaches and oversees coaching model
Coaches	4	Assist in helping students with academic or non-academic barriers
Career Readiness Specialist	1	Helps students plan career paths and assists in job skills certification planning and/or college planning and enrollment
Young Learners Child Care Manager	1	Manages The Excel Center’s drop-in center
Young Learners Child Care Attendants	2	Provides childcare in the drop-in center during operating hours (part time)

Evaluations

The Excel Center of West Central Indiana will utilize a teacher and staff evaluation rubric that designates Highly effective, Effective, Improvement necessary or Ineffective as a means of monitoring the effectiveness of best practices in the classroom. Teachers will be formally evaluated at least one time throughout the school year by the lead teacher or school director. School administrators will conduct informal evaluations throughout the school year based on observations and self-reporting of progress through a term. If a teacher requires a performance improvement plan due to a low score on any of the evaluations, they may be subjected to further evaluations throughout the school year. Instructors, regardless of evaluation status, may request more observations throughout the school year.

The GWE board will evaluate the school director based on his performance using the school director evaluation rubric, the attainment of school performance goals, and an annual performance and development review. As needed, the school will review its evaluation plan and make adjustments as needed.

Unsatisfactory Leadership

If staff members are placed on an improvement plan, it will be the responsibility of the immediate supervisor to provide concrete action steps for the staff member to follow in order to move their overall score to "effective." If an instructor is on an improvement plan for more than one term, the school director will discuss this with the lead teacher to determine the appropriate next steps, which may include forfeiting the teacher's eligibility for rehire. Whenever leadership or teacher changes can be anticipated, current staff members will train their replacements. Succession plans will be built into the fabric of Excel Center West Central Indiana, encouraging increased development and responsibilities for consistent high performers to prepare them for promotion to the next level.

School leadership members will utilize evaluation data to determine the professional development needs of individual instructors, as well as areas of growth for the entire instructional team. Continuous learning is a value of The Excel Center model, and staff members will be encouraged to pursue professional development and share best practices within their team.

Compensation & Benefits

Employees of The Excel Center of West Central Indiana will be employed by GWE. They will be at-will employees and will not use contracts. Average salaries for The Excel Center of West Central Indiana positions are provided in The Excel Center West Central Indiana's budget. The total compensation package for staff at The Excel Center of West Central Indiana will be on par and competitive with the compensation of the local school corporations.

The following are the basic benefit programs in which full-time employees may participate:

- Comprehensive Health Plan
- Employee Life Insurance
- Comprehensive Dental/Vision Plan
- Pre-tax Health & Dental/Vision Plan premiums are automatic when you enroll
- Retirement:
 - 403(b) Retirement Savings Plan
 - Teacher Retirement Fund Hybrid
 - FICA
- Personal Time Off/Vacation Days

Professional Development

The Excel Center of West Central Indiana has a robust plan in place for professional development prior to school start-up and throughout the school year. The professional development plan will include local, school-specific training sessions and opportunities to engage in The Excel Center National Network-wide professional development sessions.

Professional Development for Leadership and Teaching Staff

GEI will provide professional development for The Excel Center of West Central Indiana leadership staff on the core strategies that will be implemented to ensure the academic and operational success of the school. This includes training on

- Curriculum, assessment, and data analysis,
- Instructional best practices for adult students,
- Enrollment processes and procedures,
- State reporting and assessment training and timelines,
- Student recruitment and engagement strategy,
- Review of Standard Operating Procedures for all staff positions,
- School culture,
- Data driven decision making,
- Schedule creation,
- Teaching in the Excel Center model,
- Team management,
- The Excel Center life coaching model,
- Staff evaluation,
- Student information system, and
- Core model elements of The Excel Center school model

Teaching staff professional development will focus on attaining continuous instructional improvement to support student achievement. Prior to school start-up and during year one of school operation, professional development for teachers will focus on the implementation of the core instructional strategies essential for meeting the needs of adult high school students and the setting of a high-achieving culture. In subsequent years, teacher evaluation results combined with student achievement data will drive the professional development plans, leading to opportunities for school-wide and individualized professional learning.

For the small amount of virtual instruction, The Excel Center of West Central Indiana will offer, professional development around monitoring student progress and providing supplemental support will be covered during school start-up and as needed based on the virtual instruction needs and achievements of students.

School Leader Support

The school director has already started participating in professional development related to operating The Excel Center school model. Moving forward, the school director will travel to The Excel Centers in Indianapolis and spend time learning about The Excel Center model. The first training series will provide an overview of the school model. It will also allow the school director to develop an understanding of the mission, vision, and core values of The Excel Center, develop a clear sense of student needs, develop a sense of the school culture cultivated within The Excel Center, observe classes to understand the course and classroom structure compared to a traditional school environment, understand the roles of the lead teacher and life coaches, understand the key supports available to students in The Excel Center, and develop an awareness of the data tools and resources available to schools within The Excel Center National Network. Throughout this visit, there will be a focus on Terre Haute and how Excel Center resources and frameworks align with the needs of the Wabash Valley-area students and partners.

The school director will be paired with another school director from one of the existing Excel Center campuses operated by GEI for a year-long mentoring style of partnership. The two Directors will have bi-weekly phone calls to debrief on the progress being made in starting up The Excel Center of West Central Indiana in Terre Haute, and the GEI school director will be able to provide advice and input based on his/her experiences in The Excel Center. In addition to a peer mentor, the school director will work with GEI leadership including the school development director and the senior director of The Excel Center National Office throughout the school start-up process.

Beyond the initial School Director training, the School Director will also participate in GEI's technical leadership series meant to familiarize new Excel Center directors with the role and responsibilities of operating The Excel Center model. In

addition, the school director will visit Indianapolis at least two additional times prior to the start of school. The School Director will attend a student orientation to better understand the school opening process. The School Director will also spend time with GEI leadership to begin refining The Excel Center West Central Indiana’s curriculum, term structure, and master schedule. During a final visit, the School Director will travel to Indianapolis with the leadership team and other select staff. This will enable the school staff to observe how their roles work “in action” at an Excel Center.

Support Education Program & Build Capacity

Every staff member at The Excel Center of West Central Indiana will have the opportunity to meet and interact with The Excel Center staff from GEI’s campuses. As part of the school start-up plan and throughout the first year of operation, GEI will work closely with the school director to ensure every school staff member has a clear understanding of their roles and responsibilities. The start-up and continuous professional development staff will participate in (described throughout this section) will support the school’s education program and student achievement because it will ensure the staff is implementing the evidence-based Excel Center school model with fidelity.

Prior to School Start-Up Professional Development

Prior to school opening, teachers, coaches and all school staff will participate in professional development. Teachers specifically will be trained on the teaching techniques that are unique to The Excel Center school model. Topics included in this pre-opening training include:

- Shadow days and positional standard operating procedures: Staff will have the opportunity to visit other Excel Center locations across the country to see the best practices of a successful adult high school firsthand. During this time, they will meet with positional peers to learn about the role as well as go through training on the standard operating procedures of their specific role.
- Student Information System training: Staff will go through training to understand the basic functions of the student information system.
- Student Recruitment and Orientation Training: Staff will be trained on how to recruit students as well as how to successfully facilitate an orientation process that emphasizes a welcoming culture for adult learners.
- Curriculum Development: Staff will be trained on The Excel Center West Central Indiana’s content strategy and framework, including curriculum maps, lesson planning, and checklists.
- Teaching strategies: Teachers will be trained on best practices for teaching adults in an accelerated format. They will also be trained in how to support students using differentiation and gradual release of responsibility.
- Special education and English learners: Teachers will be trained on the processes and supports needed to successfully support students with disabilities and English Language Learners.
- Other positions: Teachers will be trained on the other roles in the building so they can understand how staff will work collaboratively and in alignment to support students and the mission of The Excel Center West Central Indiana.

Professional Development Throughout the Year

The Excel Center model is innovative in that it holds classes Monday-Thursday and reserves Fridays for self-directed student learning and the opportunity for staff to engage in professional development, driven by key data measures that are most critical to ensuring student success. On a weekly basis, The Excel Center of West Central Indiana staff will look at attendance and enrollment trends, student work and mastery, and student achievement data. Based on the results of the data, the school leadership team will identify professional development needs. In between every 8-week term staff will participate in week-long professional development, in total The Excel Center of West Central Indiana allows for 23 dedicated professional development days throughout the school year. Longer training sessions will be scheduled during professional development weeks that occur in-between terms and shorter professional development sessions will be held on Fridays as needed throughout the year. Teachers and coaches will be expected to start their day prior to the student school day and stay approximately 30-60 minutes after, time that can be used for data/student-focused meetings, professional learning, and common planning time.

No fewer than 20 additional professional development days will be built into the typical academic calendar annually, and during the first year, the school will have additional days in order to ensure staff understand the critical components of

The Excel Center West Central Indiana, launch with fidelity to the culture and model, and get fully grounded and skilled in the usage of student achievement data to inform instructional improvement.

Evaluation of Professional Development

The professional development program effectiveness will be evaluated based on school-wide and classroom achievement measures, as well as student improvement on assessments. Furthermore, throughout the school year, The Excel Center of West Central Indiana staff will review various outcome data. Weekly, the school director will review performance metrics with the school staff. In addition, term data will be analyzed during professional development rubric discussions held every eight weeks as part of data reviews. These data reviews and discussions will create a meaningful opportunity to measure the effectiveness of techniques and interventions used within The Excel Center of West Central Indiana Classrooms.

School Culture

The Excel Center of West Central Indiana will be designed to meet adults' learning needs by reflecting the characteristics of educational environments that benefit adult learners, including open discussion, self-directed learning, and personal accountability. The Excel Center West Central Indiana's academic environment will prepare students for post-secondary education, which requires self-direction, initiative, and personal discipline. The school will provide a variety of academic opportunities for growth that fit students' needs and learning styles. In order to allow students the freedom to explore these goals, students will determine the pace and, to some degree, the content of their academic program. Students will meet with teachers and coaches regularly to review their academic progress to ensure students feel a sense of ownership of their learning and belonging to the school.

Students who have previously dropped out of school have the freedom not to continue their education, and the students who enroll will have demonstrated a clear motivation. This distinction is critical to understanding the school culture expected at The Excel Center of West Central Indiana and how it will promote a positive academic environment. All students, at some point in their lives, recognized the challenges of life without a high school diploma and made the choice to return to school. The model is designed around students who have recognized the need for education and have demonstrated a certain level of motivation to continue their schooling. From the very first day of school, The Excel Center of West Central Indiana will provide support to these students by helping them overcome life barriers and set realistic goals to continue their academic progress. Specifically, students will develop confidence in their own abilities, receive encouragement and support from coaches, and receive advance confirmation that they can be successful in post-secondary environments by enrolling in dual credit courses. The Excel Center of West Central Indiana will celebrate when students show growth or positive examples of soft skills. These supports are intended to develop all students' sense of self-efficacy in achieving their educational and career goals.

Adult learners benefit from strong relationships with peers and staff which provide consistent support for education, strengthen motivation to achieve goals, and build resilience to overcome obstacles. The core of The Excel Center model is fixed-time classes with face-to-face instruction, which will permit teachers to establish relationships of trust, relevance, and respect with students. Teachers also intentionally provide peer collaboration opportunities to help student build relationships with one another. Coaches will be a critical part of establishing the school culture within The Excel Center by helping students navigate challenges in their lives and keeping students engaged and motivated.

The Excel Center staff will work with a population whose challenges are different from those typically experienced in a traditional high school setting. Thus, staff development will focus on the ways in which staff can interact with students productively. A critical component of The Excel Center West Central Indiana's success will be the hiring process, wherein teachers are selected, in part, based on their emotional intelligence and ability to build relationships with students.

Student Discipline

Excel Center of West Central Indiana students will have made a conscious choice and effort to re-engage in their education. This informs the approach to student discipline that staff at The Excel Center of West Central Indiana will take.

The Excel Center of West Central Indiana will take discipline very seriously and view suspensions and expulsions as a last resort option to ensure a safe and secure school environment.

Philosophy of Student Discipline

The Excel Center West Central Indiana's philosophy regarding student behavior and discipline is that all students, regardless of race, gender, age, background, ability, or any other factor, have the right to earn a high school diploma, while maintaining their basic health, safety, and security. Excel Center of West Central Indiana expects that all members of the school community will conduct themselves in a manner that upholds and maintains these rights. Students or faculty who engage in behaviors that negatively impact the ability of students to receive an education, or any individual's health or safety, will be dismissed from Excel Center West Central Indiana. This philosophy is consistent with The Excel Center's school model, mission, and educational philosophy because it places an emphasis on students and supports them to overcome any and all barriers to achieving a high school diploma.

In order to ensure that the school's suspension and expulsion rates remain low, The Excel Center of West Central Indiana will implement Progressive Discipline Steps. These steps will be taken to help ensure that students are well prepared for the workforce after graduation and to ensure that students are provided ample opportunities to adjust their behavior prior to leading to a suspension or expulsion. The school's discipline policy will be monitored by the school director for legal and policy compliance. Any changes to the policy will be approved by the school board.

Discipline Policy

The Excel Center West Central Indiana's student discipline policy is included in Attachment 7.

Supplemental Programming

The Excel Center of West Central Indiana will provide minimal supplemental programming due to the increased support for students that is already part of the school's plan.

Summer School

The school will operate five 8-week terms with minimal breaks throughout the year. There will not be a separate summer school option for students.

Extra-Curriculars

Because the school serves adults, it will not devote time and resources to facilitating an array of traditional extracurricular programs like sports teams and clubs. However, The Excel Center of West Central Indiana will provide support for students who are struggling to meet their basic needs and address out-of-class challenges that may impede a student's academic progress.

Student Mental, Emotional, and Social Development and Health

The Excel Center of West Central Indiana will utilize a customized curriculum with built-in social-emotional learning and college and career readiness standards specifically adapted to be relevant to adult learners and focused on future success. The environment of the school is designed to help students learn important social-emotional skills such as being considerate to others, problem-solving, and critical thinking. In addition, Goodwill is planning to provide employees at The Excel Center of West Central Indiana with Mental Health First Aid training, so they are able to support students who are experiencing mental health challenges.

Other Student-Focused Activities

The coaching model in The Excel Center of West Central Indiana will help students address the life barriers and issues that prevent students from being academically successful. Coaches will be responsible for keeping students engaged and motivated in the school. The relationship that coaches will form with students will be a critical factor in student success, as that relationship will provide security, confidence, and encouragement for students to continue when the work becomes difficult and life barriers become challenging to manage. Coaches will work to identify potential barriers to students'

continued education, whether through short-term barriers, such as housing and childcare, or long-term challenges, such as student self-efficacy and self-confidence. Based on the needs of students, coaches will develop additional student-focused activities and resources. Examples of what this has meant at other Excel Center locations across Indiana include onsite food pantries, parenting groups, and professional clothing closets. If students at The Excel Center of West Central Indiana have certain needs that the school can address, coaches will be responsible for organizing those activities with the support of the school director.

In addition to coaches helping students access long-term childcare options, The Excel Center of West Central Indiana will provide free drop-in child care to students while they are enrolled in the school. Students who are parents/caregivers will be able to bring children ages 6 weeks to 12 years old to The Excel Center of West Central Indiana with them, drop them off at the Young Learner’s Child Care, and then head to class themselves. The Excel Center of West Central Indiana is offering this service to ensure students with caregiving responsibilities are able to focus on their studies knowing their young ones are well cared for under the same roof.

Section III: Need, Demand, and the Community

Student Recruitment & Marketing

The Excel Center of West Central Indiana will be assisted by the marketing staff of Goodwill in the development and execution of the school’s marketing plan. Goodwill has been serving the West Central Indiana area since 1927 and will spend considerable time and effort recruiting students by providing information about school through a number of existing community channels, including:

1. Goodwill’s current services. Goodwill operates 9 retail stores and donation centers in its territory. In order to support The Excel Center of West Central Indiana and get the word out about the school, Goodwill will place signage and messaging within its retail stores. Wabash Valley Goodwill plans on promoting The Excel Center in each of its stores in Indiana. They will be placing flyers as well as posters in the retail stores. There will also be Excel Center specific signage put up in each store. The retail staff for each store will be prompted with a new sales delivery for the Round-up program. Each staff member will also get an Excel Center specific label to wear on their vest. A few brief slides will be played on the televisions behind the counters at each of the stores. There will also be a banner placed on each sales receipt with information regarding The Excel Center.
2. Partnerships with current and prospective service providers. Goodwill will leverage its current partnerships in the Terre Haute area to promote The Excel Center West Central Indiana. The school director and Goodwill leadership will meet with partners throughout the Wabash Valley community to fully explain the aim of The Excel Center and its target student population. Staff will seek alignment with partners in education and workforce development, and the public and social services sectors. Goodwill leadership has already met with the Vigo County School Corporation (VCSC) and plans to continue to cultivate this partnership in hopes of recruiting parents of VCSC students who did not finish high school. Once approved, information on The Excel Center of West Central Indiana will be shared with a broader number of organizations throughout the Wabash Valley area that serve the target student population to develop a vast referral network.
3. News media releases. Information announcing The Excel Center of West Central Indiana will be released via local media and on Goodwill’s website.
4. Public information meetings. Led by the school director, staff will organize and host community fairs, block parties, open houses, cookouts, and other events to build momentum and explain to students how the school might be a good fit for them or their family members. This will allow direct interaction with prospective students who will be able to meet staff, ask questions, and pick up enrollment application materials. Target locations for public

information meetings will include public libraries, community centers, etc.

5. New website development. Goodwill will provide information on The Excel Center of West Central Indiana on its website which will include academic program descriptions, enrollment information, application forms, and frequently asked questions. The school will also use social media, Facebook, Twitter, and email blasts to disseminate information about The Excel Center of West Central Indiana and upcoming events.
6. Grassroots canvassing. The Excel Center of West Central Indiana staff will also be responsible for recruiting students. Staff will arrange booths/stands at fairs and block parties scheduled by other community organizations. Staff will be organized into groups and spend time knocking on doors in the neighborhood and apartment complexes surrounding the school location. The goal of this door-to-door canvassing will be to explain the purpose of the school and invite prospective students to enroll.

These strategies will ensure a broad population knows and understands the purpose of The Excel Center of West Central Indiana and can share information about the school with people in the area who do not have a high school diploma.

Sufficient Demand

In order to determine the feasibility of opening The Excel Center West Central Indiana, Goodwill first assessed whether the evidence suggested there is a significant and sustainable level of need within the community it serves. The Indiana counties included in the study were Vermillion, Parke, Putnam, Vigo, Clay, Owen, Greene, and Sullivan. In addition to the sheer number of individuals who do not have a high school diploma, the study also assessed if the local job market had a need for more workers with high school diplomas and industry-recognized certifications.

The study found that the county with the highest need is Vigo County, with 10,464 adults without a high school diploma, which equates to 12% of the population. The analysis of the job market in Vigo county found a need for more workers with a high school diploma. As of July 2023, the unemployment rate in Vigo County was 4.5% compared to Indiana's unemployment rate of 4.0%.¹² One local employer stated that earning a high school diploma would allow many of his employees to move up within the company into higher-paying positions. The ultimate goal for students who graduate from The Excel Center of West Central Indiana will be to land good jobs that offer living wages, benefits, and opportunities for advancement.

The COVID-19 pandemic amplified some of the challenges many students were facing, resulting in the first decrease in the nation's graduation rate since 2011. The estimated national graduation rate for 2021 is 86.1%.¹³ During the 2021-2022 school year, the local school corporation reported a 9.9% dropout rate, indicating that while the local school system is successfully serving the majority of students, there are some who may benefit from an option like The Excel Center of West Central Indiana in their community.

In addition to the lunch and learns that have been held and The Excel Center tours that have been had there have been many meetings with local organizations. Meredith has made multiple presentations to the Terre Haute Chamber of Commerce. She gave a presentation to the Indiana Agricultural Institute, a group of 20 leaders from the Indiana Agricultural Community. We have also given a presentation to the Terre Haute Breakfast Optimist Club, a local philanthropy group. She also gave presentations of was the featured speaker for the following agencies: Next Steps, CODS, Downtown Terre Haute Rotary Club, and Drug Free Vigo County. She also spoke with The United Way of Wabash Valley's Job Skills Impact Council and the Wabash Valley Community Foundation's Quality of Life meeting. We foresee many of these agencies providing referrals for The Excel Center of West Central Indiana. We also plan on speaking with local manufacturers as that will be a major industry for our students to earn certifications towards. We also plan on forming partnerships with the local unions as our students could also earn certifications that will help them move

¹² STATSINDIANA *Indiana's Public Data Utility*. Accessed September 7, 2023. Retrieved from https://www.stats.indiana.edu/profiles/profiles.asp?scope_choice=a&county_changer=18167

¹³ *Building a Grad Nation: Progress and Challenge in Ending the High School Dropout Epidemic*, 2023

onto those lucrative union jobs. Another industry that we will form a partnership with will be the local healthcare providers. Certified Nurses Assistant is one certification we will offer to our students. Partnering with the local healthcare providers will afford our students a great opportunity to seek employment in the healthcare field.

Other School Options

No other adult high schools are currently operating in Vigo County.

Attachment 9 includes a list of the public high schools that will be located near The Excel Center of West Central Indiana High School.

Parents & Community

Prior to even submitting this charter application, GWE has engaged in an extensive community outreach campaign to gauge the interest of the community in supporting a school like The Excel Center. The feedback from the community has been overwhelmingly supportive of the idea of bringing The Excel Center to Terre Haute. The Excel Center of West Central Indiana plans to be a community resource that brings together individuals, families, and partners.

Family-School Partnerships

It is unlikely that many parents of students will be involved in the school for the main reason that The Excel Center of West Central Indiana will be an adult high school. Students in The Excel Center will have a higher degree of independence than traditional high school students because many students will be their own guardians and may be taking care of their own children. The school has been designed with the expectation that most students will live on their own and are more likely to be responsible for their own lives.

As noted in its enrollment policies, The Excel Center West Central Indiana's target population will be adults, however, students as young as 16 will be accepted on a case-by-case basis and with the support of the minor student's guardian. In cases where students are still below age 18, The Excel Center of West Central Indiana staff and coaches will make every effort to work with parents just as traditional high schools. Coaches will communicate school expectations with parents, provide opportunities for parents to be involved with the life of the school, and work with families to address any challenges or barriers that may keep younger students from continuing their education. Coaches will be the primary liaison between the school and the families of The Excel Center students. Coaches will meet with students and their families to understand the family dynamics affecting student success.

Available Community Resources

The Excel Center of West Central Indiana will have working relationships with a number of partner organizations that will be critical to the success of the school.

The Excel Center West Central Indiana's most significant partner will be Wabash Valley Goodwill. Goodwill will support The Excel Center of West Central Indiana by providing back-office support for school operations, allowing The Excel Center of West Central Indiana staff to focus most of their efforts on providing quality educational opportunities for students. Goodwill will support The Excel Center of West Central Indiana with a variety of in-kind support services, including

- Use and maintenance of Goodwill facilities;
- Administrative support through accounting, IT services, marketing, and HR practices;
- Some Excel Center students will have been employees of Goodwill, or family members of students will be able to find employment through Goodwill; and
- Connecting students and their families to resources in the community. Goodwill maintains solid working relationships with a number of community-based organizations, not-for-profits, and public organizations.

As the largest community college in Terre Haute, Ivy Tech Community College will be the school's primary educational partner. The Excel Center of West Central Indiana will build on Ivy Tech's dual credit course offerings for high school

students. In the dual credit arrangement, students at West Central Indiana Goodwill will be dual-enrolled as both an Excel Center and an Ivy Tech student, and completion of an Ivy Tech course will grant both high school and post-secondary credit. This will be offered to students all at no cost. Below is a list of agencies that have supported bringing The Excel Center to West Central Indiana. Many of these agencies will also be excellent referral sources or community partners moving forward.

- Next Steps
- CODA
- Downtown Terre Haute Rotary
- Drug Free Vigo County
- Breakfast Optimists Club
- Terre Haute Chamber of Commerce
- Indiana Agricultural Institute
- United Way of the Wabash Valley – Job Skills Impact Council
- Wabash Valley Community Foundation – Quality of Life Council
- CASY
- Indiana State University
- Ivy Tech Community College
- Phoenix House

Grievance Policy

The Grievance Policy is attached as Attachment 10

Section IV: Start-Up Plan

The Organizer

Goodwill Workforce Enterprises is registered to do business in the state of Indiana and has applied to the IRS for federal tax-exempt status.

Included in Attachment 11 are:

- 501(c)(3) application GWE submitted on September 29, 2023,
- GWE’s Articles of Incorporation,
- GWE’s approved Bylaws with Board Chair signature,
- GWE’s Code of Ethics Policy, and,
- Conflict of Interest Policy

The statement of Assurances is included as Attachment 12

Start-Up Plan

The Excel Center of West Central Indiana plans to partner with GEI for support during the time leading up to school start-up and for the first year of school operation. GEI will provide The Excel Center of West Central Indiana staff with 120 hours of training, support with student recruitment, lesson plan development and curriculum support, student information system implementation, and more. All decisions will be made by GWE and GEI will provide support and recommendations based on its knowledge of operating The Excel Center school model in other Indiana communities.

Included as Attachment 13 is a detailed start-up plan

Transportation

The Excel Center of West Central Indiana will not provide transportation for students directly due to the extended hours of operation and schedules that will vary for each student and change every term. The school will, however, ensure transportation is not a barrier that prevents any student from attending school. To accomplish this, The Excel Center of West Central Indiana will use several options for student transportation:

- **Public Transportation.** The Excel Center of West Central Indiana will be located on or near a Terre Haute Transit bus line and students will be provided with a bus pass, free of charge. Based on data from the American Community Survey, only a small percentage of workers age 16+ in Terre Haute use public transportation, therefore The Excel Center of West Central Indiana staff may need to help students understand how to navigate the bus system.
- **Private Vehicles.** The population of Terre Haute relies heavily on personal vehicles and since students are adults, many students will either own cars or have access to them and will be able to transport themselves to and from school. In situations where students' own vehicles, but traveling to school creates a financial burden, gas cards will be provided to students to ensure they have the ability to travel to and from school.
- **Carpooling.** The close-knit student community of The Excel Center of West Central Indiana will lend itself to carpool arrangements.
- **Walking/Biking.** Each new school that opens will be located in areas with significant need which will maximize the ability for students to walk or bike to school.

The Excel Center does not anticipate scheduling extracurricular events like field trips or athletic events, although college visits will be encouraged. To ensure students who are homeless or with disabilities are able to access school, The Excel Center of West Central Indiana will be located on a bus route. Terre Haute City Transit runs Wheels to the World, an ADA-compliant Paratransit service. The special education coordinator will ensure all students have adequate transportation that complies with IEPs or Section 504 plans.

Safety & Security

Safety of The Excel Center of West Central Indiana students and staff is the utmost priority of the board and school leadership. The school intends to install locking doors that can only be opened by staff badges or by designated staff who are able to allow students to enter. Teachers and coaches will develop close relationships with students which will encourage students to inform staff of any potential threats or safety risks.

A member of The Excel Center of West Central Indiana staff will participate in the Indiana Department of Education School Safety training. In addition to the annual training, the school will develop a school safety plan prior to opening and conduct all required trainings and drills.

In addition to these measures, Goodwill's facility team...

will strive to operate every aspect of our organization and operation as safely and efficiently as possible. Periodic audits are conducted at each facility to ensure that all components are in good working order. An audit is conducted every month by a member of the Transportation Department who utilizes a detailed checklist and has been trained as to what specifics need to be inspected. Should any defects be discovered and not able to be corrected at the time of discovery, a work order is then generated, and the repair is scheduled.

In addition to the monthly audits, the Logistics and Safety Director conducts an audit no less than once every quarter at each facility.

Included as Attachment 14 is the schools' Liability Insurance Policy

Student Admissions & Enrollment

Included as Attachment 15 is The Excel Center West Central Indiana's Enrollment Policy

Indianapolis-based Schools

NA

Virtual Charter Schools

NA

Section V: School Finance

Budget

The Excel Center of West Central Indiana is planning to outsource its school finance and payroll to an experienced provider in the community. A contract has not yet been signed but GWE has already started reaching out to experienced providers to find the right partner for this work. In addition, the school will be supported by Goodwill with finance functions.

Systems & Processes

Goodwill follows Generally Accepted Accounting Principles (GAAP). Day-to-day financial management will be provided by the Director of Finance for Goodwill. The school will be audited on an annual basis and Goodwill has years of experience undergoing financial audits. Goodwill institutes rigorous internal financial controls to ensure the following:

- Proper segregation of duties;
- Authorization and processing of disbursements; all disbursements properly authorized and processed in accordance with established policies and procedures; and
- Banking arrangements/reconciliation; Goodwill maintains bank accounts in federally insured, non-speculative, commercial bank or credit union accounts.

Included as Attachment 16 is the Budget Projections Workbook and Attachment 17 is the Budget Narrative

Attachment 18 is not applicable as Goodwill Workforce Enterprises is a new nonprofit.

Facility

Goodwill leadership is currently engaged in the search for an approximately 20,000-square-foot suitable facility to house The Excel Center West Central Indiana. The school will most likely be located in the 47804 or 47807 zip codes, which were chosen based on the needs of potential students in those areas, access to public transportation, and with community support. These 2 zip codes contain the second and third largest concentration of students we are trying to serve. There is not a Goodwill presence in this area which will allow Wabash Valley Goodwill to open a store in the same building as the school. This will allow The Excel Center of West Central Indiana to offer flexible employment opportunities to our students removing a barrier to their education. Goodwill has a dedicated Facilities Director who is well-versed in the Terre Haute community and understands the needs of the school in terms of sizing, building criteria, location, etc. Through its retail operations, Goodwill's Facilities Director has extensive experience managing compliance with federal, state, and local health and safety requirements. Dan Davis has more than 18 years of experience in managing the facilities for Wabash Valley Goodwill and more than 15 years in outdoor maintenance. This includes that all facilities managed are compliant with all local, state, and federal policies and procedures. He will bring this extensive knowledge to The Excel Center of West Central Indiana to ensure that our students are safe and our facilities sound.

In addition to this internal expertise, Goodwill is also consulting with Cushman & Wakefield, an Indiana-based real estate developer to find the right location. Cushman & Wakefield has previously been utilized by GEI and is well-versed in the needs of a facility for The Excel Center school model. The Goodwill team has been diligently touring locations and reviewing potential leasing options in preparation for opening The Excel Center West Central Indiana.

- A building that is approximately 25,000 square feet is being considered in the 47804 zip code. Not only will this building house the school but there is the possibility for a retail space as well. This retail space could potentially provide another revenue stream for the school. Wabash Valley Goodwill is currently in negotiations with the

owners of this space. Once an agreement is reached all appropriate local, state, and federal agencies will be consulted with to ensure we are compliant will all agencies.

Indianapolis-based Schools

NA

Attachment 1 – Applicant Group Resumes

This attachment contains resumes from the following individuals:

Goodwill Workforce Enterprises Governing Board Members

- Betsy Peperak
- John Lukens
- Kristin Craig
- Leah Allman
- Rene Hankins
- Mary Halsted
- Ryan Keller

Key Members of the Applicant Team (Staff)

- Meredith Osburn
- Carl Conwell
- Lisa Walker
- Darin May

- Dan Davis

Members of the GEI national office team that will support the training and opening of the school include

- Betsy Delgado
- Jaylyn Brown
- Katie Bustamante
- Khalilah Palmer
- Sarah Thomas



BETSY PEPERAK
CHIEF OPERATING OFFICER

RJL SOLUTIONS

1125 Wabash Avenue
Terre Haute, IN 47807
Phone 812-870-4773
Email bpeperak@rjlsolutions.com

EDUCATION

MASTER OF LEADERSHIP DEVELOPMENT

Saint Mary-of-the-Woods College
February 2019
GPA: 4.0
Concentration: Organizational Leadership
Thesis: Promoting West Central Indiana through a Regional Branding Initiative

MASTER OF ARTS IN ENGLISH

Eastern Illinois University
December 2012
GPA: 4.0
Concentration: Professional Writing
Thesis: Grant Writing

BACHELOR OF SCIENCE

Indiana State University
May 2008
GPA: 3.89
Major: English Teaching
Minor: Creative Writing



WORK HISTORY

RJL SOLUTIONS

Chief Operating Officer, 2021 to Present

- Design, implement, and manage business operations and strategies that affect office procedures, employee job duties, client work, and more.
- Research, develop, establish, and coordinate operational procedures/policies that promote the culture and vision.
- Oversee financial well-being of the organization by providing financial reports and projections, preparing growth plans, and directing staff.
- Manage the company finances and budget including cash flow, payroll, financial projections, accounts payable/receivable, and tax preparation.
- Serve as quality control for RJL Solutions in all areas including contract management; client deliverables including grants, advocacy and strategic communications products; and operational/HR policies and procedures.
- Develop and manage HR policies and procedures including onboarding new employees, preparing job descriptions, etc.

Chief Financial Officer, 2020 to 2021

- Developing financial well-being of the organization by providing financial reports and projections, preparing growth plans, and directing staff.
- Overseeing financial operations of the company including development and management of the operational budget.
- Managing all aspects of the company finances including cash flow, accounts payable/receivable.
- Working closely with third-party vendors on payroll and tax preparation.
- Serving as executive-level support to the strategic communications department.
- Serving as quality control for RJL Solutions in all areas including contract management; client deliverables including grants, advocacy and strategic communications products; and operational/HR policies and procedures.
- Facilitating the RJL team's efficient and effective use of project management software.

Director of Strategic Communications, 2018 to 2020

- Develop and implement communication plans for clients
- Coordinate media for clients
- Design and write promotional materials for clients including branding, website, social media presence, print materials, press releases, newsletters, etc.
- Communicate with clients during legislative sessions including lobbying reports/bill tracking, legislative session updates, etc.
- Manage the company's website, social media, newsletter, public relations, and finances
- Serve as site supervisor for interns of the company

Media Relations Manager, 2017 to 2018

- Write press releases for the company and clients
- Manage the company's website, social media, newsletter, and finances
- Perform basic office management daily functions

BETSY PEPERAK
CHIEF OPERATING OFFICER

BOARD APPOINTMENTS

TERRE HAUTE CHILDREN'S MUSEUM BOARD OF DIRECTORS

Member since 2022
Status: Active

VALPARAISO UNIVERSITY WOMEN IN LEADERSHIP CERTIFICATION PROGRAM ADVISORY BOARD

Member since 2023
Status: Active

VIGO COUNTY EXCEL CENTER

Secretary
Member since 2023
Status: Active

CERTIFICATIONS

COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)

Indiana Office of Community & Rural Affairs (OCRA)
January 2019
Status: Active

REFERENCES

KRISTIN CRAIG

Terre Haute Chamber of Commerce
kcraig@terrehautechamber.com

DUKE BENNETT

Mayor, City of Terre Haute
duke.bennett@terrehaute.in.gov

WORK HISTORY CONTINUED

SAINT MARY-OF-THE-WOODS COLLEGE

Adjunct Faculty, 2016 to 2019

- Design and implement technology-rich instruction, maintain accurate student records, facilitate classroom discussions, plan supportive learning activities
- Teach Intro to Literature, Intro to Composition, and Intro to Communication courses
- Manage courses on Distance2Learning Brightspace learning platform
- Conduct individual student conferences
- Assess students formally and informally

Communications Manager, 2013 to 2016

- Developed and implemented communication plans
- Coordinated and managed social media for the institution
- Served as Assistant Editor of the Onyx alumnae/i magazine
- Wrote and edited copy including news releases, feature articles, web content, etc.
- Executed distribution of electronic communications
- Assisted in the development of strategic communications

COMMUNITY NEWSPAPER HOLDINGS, INC., TRIBUNE-STAR

Advertising Account Executive, 2012 to 2013

- Manage business accounts currently advertising with the newspaper
- Locate and sell to new prospects
- Lay out ad design and copy for composing

EASTERN ILLINOIS UNIVERSITY WRITING CENTER

Presidential Grad Assistant/Stats Coordinator, 2011 to 2012

- Assisted undergraduate and graduate students with various elements of academic writing including generating topic ideas, writing thesis statements, developing ideas, integrating sources, and following proper documentation guidelines
- Prepared weekly and semester reports based on appointment statistics and feedback forms

PARIS HIGH SCHOOL

Language Arts teacher; Newspaper sponsor, 2009 to 2011

- Designed and implemented technology-rich instruction, maintained accurate student records, facilitated classroom discussions, maintained a classroom blog to keep students and parents informed of lessons, assignments and due dates, evaluated student work
- Taught Journalism, Composition and Literature
- Supervised production of the school newspaper and news network
- Planned supportive learning activities
- Executed range grading scheme in writing classes
- Conducted individual student conferences
- Coached students looking for extra assistance with their course work
- Composed Curriculum Maps for all classes taught
- Wrote proposals for new English electives
- Assessed students informally and formally

JOHN LUKENS

820 Ridge Road, Terre Haute, IN 47803 Phone: 812-249-0326

EDUCATION

Graduated Indiana University School of Business
1976

EXPERIENCE

Commercial Sales representative, sales manager, Chief executive officer

Forrest Sherer Insurance
1977-2020

COMMUNITY INVOLVEMENT

- Union Hospital Board, 22 years
- Union Hospital Board Chair, 8 years
- Wabash Valley Goodwill Board of Directors,
25 years
- Past Board Chair of Greater Terre Haute
Chamber of Commerce
- Past Director of Wabash Valley Community
Foundation
- Past Director of Vigo County School
Corporation Education Foundation
- Current Board Member of First
Congregational Church

Kristin Craig

kristincraig611@gmail.com - 812.208.6065

Skilled, motivated and creative professional with 20 years of experience in the West Central Indiana nonprofit and business environments. Experienced in organization management, strategic planning, fundraising, nonprofit finances and community development.

— PROFESSIONAL EXPERIENCE —

Terre Haute Chamber of Commerce – Terre Haute, IN

Executive Director, July 2019 - Present

Director of Operations and Communications, July 2012 - June 2019

Finance Coordinator, August 2010 – June 2012

Communications Consultant May 2008 – August 2009

Vice President - Marketing & Communications, January 2003 – August 2006

During my tenure with the Chamber, I have worked in a variety of roles and learned every aspect of the organization from administration and financial management to marketing and communications. A few of my specific skills and abilities are listed below.

Strategic Planning

- Guided development of See You in Terre Haute 2025 Community Plan
- Developed Action Plan, gathering key input from board and community leaders
- Expanded umbrella organization to include multiple partners and agencies

Operations & Financial Management:

- Handled all accounts payable and receivable
- Developed and implemented annual budget
- Streamlined membership database procedures, including: report writing and web integration
- Managed annual review and audit processes

Communications & Marketing:

- Managed brand management throughout all aspects of organization
- Spearheaded total website re-design
- Created and Implemented Social Media Strategy for multiple accounts
- Streamlined communications, including: weekly eNewsletters
- Raised brand awareness by writing monthly newspaper column
- Developed a wide variety of community surveys; Analyzed and reported data
- Coordinated event marketing, including creation of: logos, flyers, emails, newspaper and television ads
- Created a wide array of printed marketing materials, including: Annual Reports and Membership Directory

Additional Highlights:

- Organized partnership with Wabash Valley Human Resources Association
- Planned and supported all events, including: Golf Outing, Annual Meeting, After Hours and Seminars
- Administered Chamber Foundation (501(c)(3) entity) including: grant preparation and financial oversight
- Assisted in Development of framework for community health initiative, Better Health Wabash Valley

— COMMUNITY INVOLVEMENT —

I greatly value involvement in the community and have served with the following groups:

- Indiana Chamber Executives Association Board of Directors
- Goodwill Industries of the Wabash Valley
- Valley Professionals Community Health Center
- Art Spaces, Inc.
- Leadership Connect of West Central Indiana (formerly Terre Haute Young Leaders)
- Terre Haute Tomorrow – Image and Communications Action Teams
- Wabash Valley Human Resources Association
- Wabash Valley Crime Stoppers
- Valley Child Development Center

— EDUCATION —

Bachelor of Arts Degree, Saint Mary-of-the-Woods College

Graduation Date: May 2003 GPA: 3.5/4.0

Major: Journalism, Minor: Marketing

Master's of Leadership Development, Saint Mary-of-the-Woods College

Graduation Date: May 2016

LEAH ALLMAN

7368 Barbara Court • Terre Haute, IN 47802 • 8122303468 • lallman03@gmail.com

PROFESSIONAL EXPERIENCE

IVY TECH COMMUNITY COLLEGE

Vice-Chancellor for Enrollment Services-Terre Haute/Greencastle Campus-August 2018-Present

During the summer of 2017, an Ivy Tech statewide restructure eliminated consolidated regions. Among other significant organizational changes, the new structure included expansion to 20 Ivy Tech campuses statewide and bifurcation of Student Affairs to two cabinet roles: Vice-Chancellor for Student Success and Vice-Chancellor for Enrollment Services. The Vice-Chancellor for Enrollment Services includes oversight for all enrollment management (admission/recruitment, financial aid, VA services, express enrollment, registration/records, Greencastle Campus, and K-12/dual credit/college connection coaches.)

Highlights and Accomplishments

In 2020, the college implemented Salesforce as our CRM. Our team was well prepared for this implementation as we conducted change management sessions and utilized a variety of channels to communicate this plan and build buy in and support from our team. I served on the leadership team as the college launched Salesforce on 19 Ivy Tech campuses statewide. We built our case load recruitment plan in phases. Our Terre Haute/Greencastle conversion rate is consistently one of the top 3 in the Ivy Tech system. I am engaged daily with this strategy and utilize an amazing dashboard built in Salesforce to coach, tweak, and improve our plan and assure accountability for results. Our conversion rate for fall 2022 is currently at 43.5% as we begin our second 8 week fall 2022 term.

I led a cross functional team from Ivy Tech to create a cohort-based initiative with our nearby four-year partner, Indiana State University. This program, Pathway to Blue, launched year one during covid as we pivoted to a fully virtual recruitment plan. This program, now sitting at nearly 30 students, is taught by Ivy Tech faculty on site at Indiana State University.

Collaborating with the largest school district in our service area, we are in the process to fill coach positions to increase the post-secondary participation rate in our community. We launched a "sprint team" in the fall of 2022 that successfully grew dual credit enrollment from nearly 12% as we approach spring enrollment next month compared to end of year for 2021-2022.

In partnership with the academic team, implemented dual enrollment (campus-based courses for high school students) programming to support fall enrollment and assist high school students to work toward their Ivy Tech credential and convert to degree seeking students upon high school graduation.

In collaboration with our workforce alignment team, academic team, and local business partners, implemented the Achieve Your Degree program that allows employees to utilize company tuition assistance with deferred billing in a concierge format. Current enrollment is Achieve Your Degree is 190 headcount as we help companies and entities to build their own talent pipeline from within.

Vice-Chancellor for Student Affairs – Wabash Valley Region and Southwest Region, 1/2015-12/2017

Selected as Vice-Chancellor for Student Affairs for newly consolidated region. Responsible for supervision of 16 direct reports and nearly 50 full time employees. Position included seat on Chancellor’s Cabinet and board of trustee role at both campuses. This role included: Title IX, disability services, student life, financial aid, veterans affairs, student success/wrap around services, mental health services, admission/recruitment, academic advising, express enrollment, registration and records, student judicial, on campus child care center, campus food services, wellness center, career development, new student orientation

Highlights and Accomplishments

Implemented strategies at the Southwest Region to mirror those in place at the Wabash Valley Region to improve retention by fully utilizing early alert/case management software within the academic advising team and imbedding similar strategies with faculty. Fall to spring retention improved from 66% to 70%. This was the highest improvement in retention in the Ivy Tech system. Responded quickly in organizational gaps to consolidate positions and develop recruitment plan to increase enrollment from direct from high school market. Initiated the Student Success and Retention team at the Southwest Region. Continued to oversee comprehensive services and programs at the Wabash Valley Region (110 miles separate the two campuses).

Vice-Chancellor for Student Affairs-Wabash Valley Region, 2000-January 2015

Chief Student Affairs Officer providing leadership for functional areas including admissions/enrollment management, veteran’s affairs, academic advising, transfer services, career services, disability services, Title IX, student judicial, student life, new student orientation, student success/counseling services, financial aid, academic advising, and Express Enrollment Center.

Highlights and Accomplishments

Prepared the regions student affairs strategic plan; participated as regional student affairs member involved in achieving a ten-year regional re-accreditation; co-lead for implementing the student module for the Banner enterprise-wide information systems; served on the statewide core team for Achieving the Dream to focus on increasing student completion; implemented strategic interventions in requiring New Student Orientation (NSO), mandatory academic advising and the development of an Individual Academic Plan (IAP) for all new degree seeking students; implemented an academic advising center; planned and developed facility and programming for Student Commons area to include coffee kiosk, on campus food service, and informal gathering spaces for students, faculty, and staff; designed and implemented comprehensive student life plan to include new fitness center, Student Leadership Academy, and expanded Veteran Affairs services by applying and receiving the Military Family Research Institute grant.

Director of Admission, 1998–2000

Responsible for new student recruitment, new student intake, advisement, and orientation.

Highlights and Accomplishments

Re-organized data entry to improve accuracy and efficiency; developed filing/imaging system, acceptance letters, and a recruitment tracking system; initiated outbound calling student telecounseling program; organized high school/middle school counselor connections via off campus breakfast meetings and on campus information programs; developed and initiated on-campus recruitment programs, convened a team and developed an on campus community day that brought parents and their children to campus for hands on fun/educational activities; implemented early outreach to high school sophomores and juniors in the region through the College Board's Student Search Program; implemented Admission Office indexes to measure outcomes and improve processes

INDIANA STATE UNIVERSITY, TERRE HAUTE, INDIANA

Director of Admission, 1995-1998

Responsible for the planning, implementing, and evaluating of all recruitment activities

Highlights and Accomplishments

Responsible for hiring, supervision, training and evaluating a staff of 16 including seven professional staff; initiated early outreach program to middle schools and on campus recruitment programs to target specific student populations (high school sophomores, minority students, high achieving students); utilized the College Board - Enrollment Planning Service to pinpoint high schools in geographic markets that contained the best prospects, utilized Ruffalo Cody to qualify and grade prospects and target staff and department resources accordingly. Served as the primary administrator who worked with the Department of Athletics at Indiana State University.

Associate Director of Admissions, 1989-1995

Responsible for the day-to-day operation of the Office of Admissions

Highlights and Accomplishments

Supervised, evaluated, and trained all admissions administrative staff, developed extensive staff training, team building, and evaluation process to improve leadership skills, productivity, professionalism; planned, coordinated, assigned, and participated in travel around the state of Indiana for the purpose of student recruitment; coordinated the development of all recruitment materials and applications; organized and implemented a personalized search process to 56,000 PSAT takers; planned and coordinated high school counselor workshops; organized and participated in all on and off campus recruitment programs. Served as the primary administrator who worked with the Department of Athletics.

Assistant Director of Admissions, 1983-1989

Responsible for an assigned travel territory within Indiana

Highlights and Accomplishments

Responsible for a travel territory that included 90 high schools; participated in all on and off campus recruitment programs; organized off campus registration programs in Evansville and Vincennes; met with prospective students and parents; served as liaison to the Athletic Department and Alumni Affairs Office; conducted certification of all NCAA eligibility for new student athletes at the University

COMMITTEE INVOLVEMENT

Chancellor's Cabinet, 2000-present
Student Success and Retention Council, 2000-pr
Salesforce CRM statewide selection and implementation team - July 2019-present
Statewide Strategic Planning Team – co-lead goal 2/strategy 2.4 - May 2018-Present
Higher Learning Commission Leadership Team (Terre Haute Campus) – 5/2017-2019
Achieving the Dream Core Team, 2009-2011
Co-chair, Student Success and Retention Council 2009-2018
Co-Lead, Banner Student Implementation Team 2006-2009

PROFESSIONAL MEMBERSHIP

National Association for College Admission Counseling (NACAC)
Student Affairs Administrators in Higher Education (NASPA)

PROFESSIONAL ACCOMPLISHMENTS – COMMUNITY ENGAGEMENT

IACAC Admission and Financial Aid Congress Planning Committee, Program Chair, 1991, General Chair, 1992
Co-Presenter, "Monetary Manipulation and Magic," AACRAO National Conference, Orlando, Florida, 1993
Co-Presenter, "A 'Taste' of the Admissions Middle Management Institute," IACAC State Conference, Indianapolis, Indiana, 1993
Co-Presenter, "From Viewbook to Newsletters: Publications for Admissions Office," IACAC State Conference, Indianapolis, Indiana 1993
Co-Presenter, "What Your Director Hasn't, Can't, and Won't Tell You," IACAC State Conference, Indianapolis, Indiana
Co-Presenter, "Communication, Trust, and the Importance of Healthy Relationships in Building Successful

Teams," Ivy Tech Community College Student Success Conference, French Lick, Indiana, April 2018

Simplex Facilitator Training (level 1), Creative and Collaborative Problem Solving, September 2017

Publication: *Community College Journal*, "She's Come Undone" Allman, Valentine, and

Valentine

Publication: *NACAC Journal of College Admission*, Fall 2012, "She's Come Undone" Allman, Valentine, and

Valentine

NACAC Bulletin, Featured Member Spotlight, March 2013

Certificate of Completion, Leadership from the Heart by Brandon W. Johnson, Class 400, November 2011

President, Terre Haute South Vigo High School Athletic Booster Club, 2012-2014

Board Member, Family Services Association Counseling, 2012-2018

Kiwanis of Greater Terre Haute, 2009-present

Kiwanis of Greater Terre Haute, Bringing Up Grades (BUG) team captain, 2010-present

EDUCATION

Master of Science in Physical Education

Indiana State University, Terre Haute, IN

Bachelor of Science in Physical Education

Indiana State University, Terre Haute, IN

Lincoln Trail Community College

Robinson, Illinois

REFERENCES

Available upon request

René Hankins

5231 Prairie Court
Terre Haute, IN 47805

812-229-1122
arhankins@frontier.com

EXECUTIVE SUMMARY

Experienced professional with dynamic ability to self-manage projects, multi-task and provide leadership to a team. Known for the ability to identify the need for change and provide innovative solutions that lead to success. Educational background with emphasis in curriculum design, administrative systems and customized program development. Career emphasis on helping students reach their fullest potential.

PROFESSIONAL EXPERIENCE

Rose-Hulman Institute of Technology – Terre Haute, IN
Rose-Hulman – www.rose-hulman.edu

Sept 2017 - Present

Director of Pre-College Outreach

- Attend the National Science Fair and World Robotics Competitions to recruit talented STEM students to Rose-Hulman.
- Meet with prospective students and families to provide information about Rose-Hulman for an informed college decision.
- Represent Rose-Hulman at select college fairs, and enter prospects into our SLATE system to track students in the recruitment funnel.
- Organize events on campus that outreach to younger students and introduce them to science, technology, engineering and mathematics.
- In collaboration with faculty, plan and organize summer camps for Rose geared towards high school students.
- Teach RHIT 100 – College and Life Skills to entering freshman. Help students with the transition to college.

Ivy Tech Community College - Terre Haute, IN
Changing Lives - Making Indiana Great – www.ivytech.edu

July 1998 – Aug 2017

Executive Director of Outreach – (April 2012 – August 2017)

Interim Executive Director of Outreach – (July 2011 – April 2012)

- Developed and supervised the College Connection Coach program. Responsible for 14 coaches serving 36 schools. Provided students and parents with pathways for college attainment.
- Coordinated agreements at 52 high schools for Dual Credit Programming, including professional development for instructors.
- Developed, implemented, and evaluated long-range goals and annual objectives for outreach sites, international relations and secondary partnerships that contribute to campus enrollment objectives.
- Provided Leadership for three outreach locations: Parke County Learning Center, Martin Luther King Center, and Greene County Learning Center.
- Planned and administered program budgets and work closely with Advancement to identify opportunities for Foundation growth and grants related to Outreach. Worked closely with the Evansville campus to obtain a Toyota Grant to help support the College Connection Coach program for \$25,000.
- Established international relations and recruitment including foreign community partnerships, faculty and student exchange programs and international business development opportunities.
- In collaboration with Academic Affairs, Student Services, and Corporate College, planned strategies to support outreach growth, delivery of instruction and student activities at the sites.
- Developed and maintained positive community relations by staying abreast of educational and community issues.
- Lead new programming at outreach centers, including Business and Entrepreneurship Services Center, new block scheduling options, community events, etc.

WorkOne System Director – (February 2009 – June 2011)

- Managed \$2.4 million dollars in grant funds. Allocated funds to counties for assisting customers with training and employment opportunities.
- Lead and managed a team of up to 45 employees. Including a combined staff from two organizations.
- Responsible for hiring, training, and evaluation of WorkOne service provider staff.
- Launched and managed a successful online tracking system that provides over 900 electronic records detailing client expenses and financial obligations.
- Set policy and procedures for service provider employees that are in compliance with the Workforce Investment Act, the Department of Workforce Development, EEOC and DOL regulations and guidelines.
- Connected the six county offices through the use of electronic communication and scheduling products.
- Assisted in the relocation of four county offices. Responsible for IT set up, and implementation of the new integration model.
- Implemented the joint registration process for ABE providers and WorkOne. Served on ABE/WorkOne committee, creation of the registration packet, and training for the staff.

Manager, Workforce Economic Development – (May 2008 – February 2009)

- Responsible for sales and coordination of training activities for local business and industry.
- Collaborated with local hiring managers to create customized programs for employees.
- Cultivated and established relationships with business and industry leadership.
- Recruited and hired up to 20 adjunct faculty to teach specialized training courses.
- Committee member that outlined the Customer Relationship Management (CRM) process flow and made recommendations for system.

Manager, Workforce Certification Center – (February 2001 – May 2008)

- Participated on the initial team of managers to open and operate the Workforce Certification Centers for Ivy Tech Community College.
- Served on the statewide committee for Workforce Certification that provided leadership and direction for the growth of the centers.
- Applied for internal grant money that brought more than \$200,000 to the Wabash Valley Region for new certification training equipment and curriculum.
- Increased number of certifications awarded by incorporating the exams as part of a student's course.
- Negotiated test vouchers and continually reached out to new testing vendors to be a part of the network.
- Designed and implemented an online tracking database for the college's inventory of exams.
- Trained 6 center staff and ensured proctors had the credentials necessary to administer exams.
- Administered employee assessments for 17 local companies and provided hiring solutions.

Adjunct Instructor – (July 98 – August 2017)

- Certified Instructor for Microsoft Office and basic computer courses.
- Instructed both credit and non-credit courses.
- Coordinated and fulfilled training activities with local companies.

EDUCATION AND CERTIFICATIONS

Indiana State University - Terre Haute, IN – Master of Science, Curriculum, Instruction and Media Technology (Technology Coordinator) – 2007

Indiana State University - Terre Haute, IN – Bachelor of Science, Business Education – 1999

Indiana State University - Terre Haute, IN – Bachelor of Science, Administrative Office Systems - 1996

Certifications:

- State of Indiana Teaching License - 5-12
- National Career Pathways Certification (NCPN)
- Microsoft Office Specialist - Authorized Instructor
- DISC - Instructor Certification
- ServSafe Food Manager Certification
- CPR/First Aid
- Test Administrator for Various Vendors - (Pearson VUE, Prometric, ACT, etc.)

CAMPUS AND COMMUNITY INVOLVEMENT

- United Way Account Manager
- IN Girls Collaborative – Leadership Team
- Greater THAN Representative
- Wabash Valley Goodwill Industries, Inc. – Board Member
- Wabash Valley International Consortium Member
- Academic Business Council Member
- Co-Chair of Green Committee – Ivy Tech Community College
- Member of Diversity Committee – Ivy Tech Community College
- Graduate of Leadership Academy – Ivy Tech Community College
- Graduate of Leadership from the Heart – TEAM 403
- Graduate of the Executive Leadership Cohort for Ivy Tech Community College
- Co-Owner of Yogurt In Love, Plainfield, Indiana (July 2015 – December 2018)

Resume

Mary S. Halsted

1120 E. Davis Dr., #737

Terre Haute, IN 47802

Summary: Approximately 30 years' experience in employment, Human Resources, recruiting

Education: The University of Michigan, Ann Arbor, MI

BA/Russian Studies

Post Graduate studies in Guidance/Counseling (Wayne State University) and History (UM)

Employment: Employment Counselor, Michigan Employment Security Commission, Detroit, MI 1966 – 1969

Interviewed and counseled challenged job seekers; occasionally involved in job development, placement.

Lead Interpreter, Edison Institute/Greenfield Village Museum, Dearborn, MI

1982 – 1984

Interpreter of history to thousands of visitors. Lead interpreter for all Edison holdings; trained and supervised staff interpreters. Job included teaching, research, acting.

Employment Coordinator, Union Hospital, Inc., Terre Haute, IN 1986 – 1993

Reporting directly to VP/HR. Responsible for filling all professional and non-professional (except nurses) positions at 343-bed hospital. Screened, interviewed, oriented all new employees. Provided HR support and guidance to administration and other managers. Represented hospital in all unemployment cases. Served as director – hired, scheduled, fired – secretaries in Clerical Support Pool.

Corporate Recruiter, Trialon Corporation, Flint, MI 1994 – 1996

Recruited, using all available methods, engineers for this temporary staffing service.

Employment Manager, Union Hospital, Inc., Terre Haute, IN 1996 – 2010

All above duties plus directing HR department of a then-3,000 employee organization including a satellite rural access hospital in Clinton, IN. Added Workers' Compensation support to health service and more administration.

Retired 2008 and continued on PRN basis as chaplain's assistant for 2 years.

Volunteer organizations include Terre Haute Symphony League (secretary), Centenary UMC (secretary to Church Council), Goodwill of Wabash Valley (Board), Westminster Village Executive Council, Westminster Village Library (chair).

RYAN J. KELLER

Brazil, Indiana 812.239.5354 ryankeller@gmail.com

Key competencies

- 17 years of leadership, training, coaching, and mentoring experience
- 15 years of project development, management, assessment, and evaluation experience
- 12 years of experience with budgets from \$500,000 – \$7,500,000
- 7 years of instructional design and course development experience
- Developed 75+ synchronous and asynchronous face-to-face, blended, and online courses
- Developed multiple business and strategic plans for-profit and non-profit organizations
- Strong focus in a Servant Leadership model for personal and organizational growth
- An emotionally intelligent communicator, presenter, and leader
- A strong focus in building trust and life-long relationships, not just short-term partnerships
- Result and data-driven encourager of creative solutions to problem-solving
- Proactive change manager

WORK EXPERIENCE

Thrive West Central; Terre Haute, Indiana

08/2019 – Present

Executive Director

Executive Director of West Central Indiana Economic Development District, Inc. d/b/a/ Thrive West Central. Thrive West Central is 501(c)(3) non-profit. Thrive serves the West Central Indiana region (13 counties) as the Economic Development District, the Area Agency on Aging (AAA), a Community Development organization, a Rural Transportation organization, and as the region's Housing Hub. Responsible for all leadership and day-to-day operations, compliance, risk management, contract management, and for fiduciary duties. Works tirelessly to align mission with operations and customer outcomes. Focused intensely on building a phenomenal team to serve our customers.

- Completed a rebranding in 2020 to reposition and rebuild trust within our region
- Increased new customer growth from six counties to 13 and continued to grow revenue from \$5.5 million to a projected \$15 million+ in 2024
- More than doubled AAA case management base from 600 clients to 1350 as of July 2023
- Launched as well as grew numerous INDOT partnership programs ranging from a 13-county traffic counting program to a new state-wide local government planning pilot to tripling SURP revenues
- Serve as the fiscal agent for the Wabash River Regional Development Authority (\$20 million oversight)
- Created and launched an innovative *Homes for the Future Program* utilizing READI funding; thus far, leveraging \$25.7 million in private development, creating 130 new homes, and providing \$952,000 in infrastructure assistance
- Created a Regional Housing Hub to serve member counties to develop the right type of housing at the appropriate pace for each of their counties via Regional and Local studies and market potential analyses
- Received more grants in the past four years than in the previous twenty years combined
- Grew organization from a team of 36 to 61, with growth expected to climb to 75+ by the end of 2024
- Created the Thrive Foundation to cover the growing needs with the aging population where public funding does not fully support

Certell, Inc.; Indianapolis, Indiana

05/2016 – 07/2019

Chief Operations Officer

Chief Operations Officer of a worldwide educational nonprofit organization. Responsible for the day-to-day operations, compliance, risk management, reporting, strategic planning, internal and external marketing, program development, data reporting, budgeting, and human resources. Faithfully executes the strategic plan to achieve and exceed goals. Dependably demonstrates a relentless obsession with value alignment, focus, customer obsession, simplicity, and clarity.

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Designed and implemented strategic goals for growth and performance within our target markets. Established new policies and procedures that promote Certell's mission and vision. Curriculum developer of educational content. Focused efforts in improving organizational effectiveness through targeted outcomes, team and relationship building, networking, and developing long-term partnership in and around central Indiana.

- Exponentially increased new customer growth from 80 schools (5600 students) to over 4100 schools (462,000 students) in less than three years
- Increased social media following by 430% in two years by differentiating the channel by subject, content, and humanized presence
- Developed multiple evolutions of Certell's website structure and layout to simplify messaging, increase the sales conversion and customer registration process
- Developed a complex system of customer outcomes and tracking based on product usage focused on upselling marketing campaigns through Infusionsoft
- Developed multiple comprehensive full-semester educational programs for use at high school, university, and adult learning levels
- Created the organizational strategic plan. Lead, model, and hold the team accountable to ensure that everyone is striving to achieve the mission, vision, and goals of the organization
- Evaluate organizational outcomes and data analytics to ensure program effectiveness, quality, and goal-oriented outcomes are being met in an AGILE model
- Co-developed an eReader/eBook platform with built in data reporting tools to measure learning outcomes at the point of consumption
- Lead a team of 50-75+ full-time, part-time, seasonal, and independent contractors from multiple countries
- Manager of strategic partnerships with 25+ partner organizations
- Effectively collaborates and maintains a positive relationship with the CEO regarding strategic vision, networking, key partnerships, along with fundraising and grant proposals

Ryan Keller Consulting, LLC; Central Indiana

03/2019 – Present

CEO

Owner of a central Indiana based Leadership Development Company. I guide clients through an in-depth process of self-discovery, strategic planning, and execution that leads to the attainment of individual and organizational goals. I focus my efforts on improving organizational effectiveness through targeted outcomes, strategic thinking, team and relationship building, change management, networking, and developing long-term partnership with internal and external organizational stakeholders. All work is on a contractual basis.

- Individual and organizational development
- Strategic and business plan development
- Program development
- Instructional coaching and development
- Change management, career coach and peer mentor

Kaleidoscope Leadership Development, LLC; Central Indiana

10/2015 – 10/2017

Co-Owner

Co-Owner of a central Indiana based Leadership Development Company. Responsible for the day-to-day organizational business operations. Curriculum developer of leadership and educational content. Organizational development trainer. Responsible for negotiating partnership agreements. Focused efforts in improving organizational effectiveness through targeted outcomes, team and relationship building, networking, and developing long-term partnership in and around central Indiana. All work is on a contractual basis. Leadership developer and best-practice consultant.

- Developed and facilitated the curriculum for the six-week Indianapolis Chamber of Commerce Ascending Leaders Course.
- Instructional development and trainer for multiple profit and not-for-profit organizations.
- Develop business and strategic plans for start-up profit and not-for-profit organizations.
- Lead multiple Peer-to-Peer coaching, mentoring, and leadership development sessions.

- High School and College student mentor and career coach.

Harrison College; Indianapolis, Indiana

01/2015 – 05/2016

Program Chair – School of Business

Responsible for business course management, oversight, and driving continuous improvement and best instructional practices. Supervise and lead 10 – 15 adjuncts on a quarterly basis. Responsible for all student advising and scheduling for business courses. Responsible for development of course and adjunct faculty to ensure that best practices in instruction and in adult learning are followed. LMS Trainer for Deans, Program Chairs, and Faculty. Ensure implementation of Business Program and teaching initiatives to improve productivity through a targeted approach linked to performance management system (Qualtrics and Tableau). Initiate needs assessments to determine baseline measures for targeted improvement initiatives and measures and reports on business impact of implementation.

- Facilitate 30+ faculty and staff trainings per year.
- Created an online orientation and sandbox course for adjunct faculty to onboard, practice, demonstrate, and peer-to-peer coach/mentor instructional techniques.
- Assist in the long-term strategic management of Business Programs through data-driven performance measures.
- Increased course retention from 66% to 81% within six months. Course retention is currently at 91% for the winter quarter.

Harrison College; Indianapolis, Indiana

03/2013 – 01/2015

Instructional Development Manager

Project manager for all instructional development work for Corporate Partnerships, Harrison International, the School of IT, and all custom content programs. Coordinator of external corporate and non-profits organizations to create and develop programs for continuing education of workforce in *blended, online, and on-ground* models. Responsible for evaluation and assessment of presented materials for improvement and the development of facilitator manuals.

- Instructional Development Employee of the Year 2014.
- Developed the implementation of custom development projects, such as: Simon T. Bailey Emerging Leadership Program with UPS and Kroger; and, the Fireground Training Program using a modified AGILE model.
- Developed and managed 8 – 12 course developments on a quarterly basis.
- Managed 8 -12 Subject Matter Experts (SMEs) on a quarterly basis.
- Developer of internal and external training content for adult learners.
- Performed regular program assessments and evaluations leading to improved organizational/program effectiveness (Qualtrics & Metrics That Matter).
- Developed Harrison's first online, asynchronous, student orientation course (Articulate Storyline, Camtasia).
- LMS Training Migration Manager for LMS transition to Canvas.
- Served as an Interim Instructional Coach for Communications adjunct faculty.
- Multiple LMS experience with Moodle, ANGEL/Blackboard, and Canvas.

Greencastle Community School Corporation; Greencastle, Indiana

08/2009 – 03/2013

Life Science Teacher

Life Science Teacher in disciplines of Biology, Anatomy & Physiology, and Earth & Space Science. Managed 150 – 200 students daily. WIKLC Program Coordinator for Plato Learning Environment. Student At-Risk committee chair. New technology trainer at high and middle schools. National Honor Society Advisor. Response-To-Intervention Trainer. Student-At-Risk instructor and team building coach.

- Implemented a flipped classroom approach in conjunction with a Servant Leadership model increasing Biology ECA passing rates from 31% to 69% within three years.
- School Accreditation Committee Co-Chair responsible for Governance and Leadership of corporation accreditation standards.

- Implemented and coordinated the WIKLC credit recovery and accrual program establishing 150+ school-wide additional non-traditional credits per year. Implemented and taught an online summer school credit recovery and accrual program achieving an additional 50+ credits, which resulted in an additional three students earning a diploma.
- Completed 100+ hours of Response-to-intervention training, differentiation, and sensitivity training leading to the improved performance of students' grades, behavior, and motivational team skills.
- Facilitated summer training courses for corporation faculty on best practices for the development of online Moodle courses.

Steel Guard Safety Products; Terre Haute, Indiana
Regional Sales Manager

03/2009 – 08/2009

Responsible for managing over 200+ accounts, management of inside sales and lead/cold calling customers within Indiana & Illinois. Technology, Safety, and Development Trainer. Assisted in implementation of proper OSHA and HAZMAT safety programs.

- Developed and maintained budget and sales goals for sales team.
- Implemented cross department product check to eliminate production errors prior to reaching customers, which identified cost savings of \$35,000 annually.
- Conducted customer satisfaction meetings and surveys reducing customer complaints by 40%.
- Managed a budget of \$500,000.

Ceres Solutions; Western Indiana
Sales and Consulting Manager

04/2005 – 03/2009

Responsible for management of 75+ accounts with suppliers and growers. Responsible for scouting and field recommendations for over 10,000 acres. Provided consulting and recommendations for seed, fertilizer, herbicide, pesticide, nutrient management, and integrated pest management plans. Crop field day project manager and presenter. Development and training supervisor.

- Increased seed sales by 150% over four years.
- Project managed 5-8 field days per year managing 15+ workers and accommodating 100+ guests.
- Implemented nutrient management and IPM plans saving customer base over \$100,000 annually.
- Managed a budget of \$1.2 million.
- Education and training manager for all employees and customers within regional area.

Birmingham Barons Baseball Club; Hoover, Alabama
Assistant Superintendent

03/2004 – 10/2004

Supervised a complete field renovation including turf, irrigation, and drainage systems; Developed pesticide and fertilization plan. Supervised and trained interns and game day workers. Responsible for building and maintaining all mounds. Primary contact for coordination of special activities on the field with office staff, vendors, and city employees. Seasonal Position.

- Project managed a complete 3100 sq. ft. sod project of infield and side lines.
- Developed training program for interns and six game day workers.
- Hosted SEC championship tournament supporting over 15 teams and 5000+ fans.
- Managed a budget of \$250,000.

Teaching Experience

- C.R.A.D.L.E.S Personal Finance Volunteer Instructor (2019 – 2020)
- L.A.U.N.C.H. Science Teacher Volunteer (2016 – 2018)
- Harrison College Adjunct Faculty for Strategies for Student Success Courses (2014 – 2016)
- Co-facilitator the Ascending Leaders Course through the Indianapolis Chamber of Commerce and Harrison College (2015 – 2016)
- Secondary Education grades 9-12 (2009 – 2013)
- Secondary Education tutor for grades 6-12 (2009 – 2013)

Boards, Committees, Recognitions, and Philanthropy

- Thrive Foundation
- Goodwill Excel Center Treasurer & Board Member (2023 – Present)
- Terre Haute Chamber of Commerce Board Member (2021 – Present)
- West Central Indiana WorkOne Board Member (2019 – Present)
- Clay County Community Foundation Advisory Committee (2022 – Present)
- Volunteer for the Clay Youth Food Program (2018 – 2020)
- YMCA of Clay County Advisory Council Member (2016 – 2018)
- Tri-Kappa of Clay County Organizational Advisor (2015 – 2018)
- Harrison College Student-At-Risk Advisory Committee Member (2015 – 2017)
- Harrison College Business Advisory Board Chair (2015 – 2017)
- Harrison College Faculty Performance Evaluation Committee Member (2015 – 2017)
- Harrison College eLearning Committee Member (2014 – 2016)
- Harrison College Instructional Design Employee of the Year (2015)
- Harrison College Learning Management Evaluation Committee (2015)
- Volunteer and sponsor for Success by 6 and Adopt-a-Child (2010-2014)
- Strategic Planning Advisor at Annunciation Catholic Parish (2014 – 2016)
- Mentor at Indianapolis Metropolitan High School (2013 – 2015)
- St. Mary-of-the-Woods Lemonade Day Graduate Assistant Coordinator (2013)
- Greencastle Community Schools Accreditation Committee Co-chair (2010 – 2012)
- Greencastle Community Schools Student At-Risk Committee (2009 – 2013)
- Greencastle Community Schools Camp Read-A-Lot Coordinator (2011 – 2013)
- Greencastle Community Schools National Honor Society Advisor (2009 – 2013)
- Elks House Committee member (2009 – 2011)
- Clay County Literacy Coalition President (2006 – 2008)
- Clay County Lions Club member (2005 – 2006)

Education:

Graduation Date: February 2014 **Saint Mary-of-the-Woods College**
Masters of Leadership Development with a focus in Not-for-Profit leadership

Graduation Date: May 2010 **Indiana Wesleyan University**
Licensure in Secondary Biology

Graduation Date: December 2003 **Purdue University**
Bachelor Degree in Plant Science and Agronomy with an emphasis in Turfgrass Science

M E R E D I T H A . O S B U R N
5218 E. Old Ft. Harrison Ave • Terre Haute, IN 47805
Phone: 812-264-3113 • Email: mosburn@wvgoodwill.org

SKILL HIGHLIGHTS

- Project planning and management
- Leadership and communication skills
- Loss prevention
- Marketing and social media
- Website maintenance
- Strategic planning
- Market research and analysis
- Sales analysis and reporting
- Team building and staff motivation skills
- Multi-unit operation management
- Staff training and development
- Employee recruitment
- Work-flow planning and change implementation
- Customer-oriented
- Vendor negotiations, distribution and inventory control
- Self-motivated
- Time management skills
- Organizational skills
- Community event management

PROGRAM EXPERIENCE

October 2017 – April 2018 **Senior Leadership Program** Washington, DC

Goodwill Industries International

- Participated in and successfully completed a development program centered around Goodwill's core mission of employment opportunities and training to those with barriers to employment
- Placed in a team of peers to complete a research project specifically assigned to our group according to our self-assessment results
- Completed self-assessments to gain a better sense of my own style of leadership and how to utilize those skills to be successful
- Gained knowledge to leverage strengths of team members and how to make them the most successful

October 2020 – February 2022 **Executive Development Program** Washington, DC

Goodwill Industries International

- This program experience focused on results and performance. The curriculum included concentration on the following areas:
 - Leadership Board Relations
 - Emotional Intelligence Ethics
 - Organizational Culture Advocacy and Public Policy
 - Dealing with Ambiguity Social Enterprise
 - Organizational Change
 - Organizational Design
 - Organizational Diagnosis

EXPERIENCE

June 2021 - Present **President and Chief Executive Officer** Terre Haute, IN

Wabash Valley Goodwill Industries, Inc.

- Works closely with the Executive Staff and Board of Directors to provide guidance and support for the administration and management of Wabash Valley Goodwill.
- Provides leadership for all aspects of the operations with an emphasis on long-term goals, growth, gaining margins, and return on investments.
- Is the approving authority of operating practices and procedures, capital equipment expenditures in the operating budget, and the annual operating program.
- Works to support Wabash Valley Goodwill's Purpose, Mission, Vision, and Core Values.
- Works with community leaders in the territory we serve to build advocacy and support of Wabash Valley Goodwill's mission and purpose.

December 2020 – June 2021 **Chief Operating Officer** Terre Haute, IN

Wabash Valley Goodwill Industries, Inc.

- Responsible for the development and implementation of strategies and operations within Wabash Valley Goodwill.
- Responsible for research, development, and launch of new business enterprises. Responsible for real estate development, facility operations, health and safety practices, as well as the finance, technology, and risk management-related operations to support WVG priorities.
- Participate in the development of plans and programs for Wabash Valley Goodwill as a tactical partner in evaluating and advising on the impact of long-range planning and regulatory action on the areas of responsibility.
- Assist the President and CEO and the board and other senior executives in performing their responsibilities.
- Responsible for choosing, with consultation with the President and CEO, a Retail Operations Director, and providing the necessary training and support.
- Works to support Goodwill's Purpose, Mission, Vision, and Core Values.

2010-December 2020 **Retail Operations Director** Terre Haute, IN

Wabash Valley Goodwill Industries, Inc.

- Assisted in the growth of operational revenue by 65.3% in my nine years as director
- Expanded the retail network from six stores to ten stores
- Remodeled and expanded selling square footage of three retail locations
- Relocated and expanded selling square footage of two retail locations
- Opened retail locations in two new cities within our territory
- Attend Goodwill seminars and associated trainings

- Retail sales contributes 88% to the overall budget for the organization
- Manage a team of one Senior Retail Manager, 10 Store Managers, Ecommerce Lead and 100 plus support staff
- Created a successful in-house marketing plan for Wabash Valley Goodwill
- Reports directly to the President and CEO of Wabash Valley Goodwill
- Trained in Kaizen method of production and implemented in backroom processing
- Accountable for the retail operations
 - Management and maintenance of the Retail Handbook for Management
 - Prepares and provides retail stores with daily production goals and sales quotas
 - Manages the voucher programs for qualified clients in our retail stores
 - Assists in preparing the organizational budget with the President and CEO
- Responsible for E-Commerce
 - Management, maintenance and troubleshooting with the marketplaces, ShopGoodwill and the jewelry operation
 - Negotiating with shipping vendors
- Responsible for student, client and volunteer workers in all store locations
- Meetings and updates with Dell Re-Connect
- Works directly with our in-house computer technician, ensuring all wiping and technical policies and procedures are being followed properly and accurately
- Responsible for management of the free medical loan program at all store locations

2005-2010

Project Manager

Terre Haute, IN

Sony DADC

- Planned with internal and external parties to organize the various components needed to initiate, run and conclude various projects.
- Coordinated schedules and tracking progress of various projects through supply chain; manufacturing through distribution
- Provided the customer with a main point of contact
- Provide excellent customer service through written and verbal communication
- Built DVD, Blu-ray, UMD and/or CD finished good product
- Provided solutions for the customer if issues occurred
- Attended training for on-going system updates and revisions
- Knowledge of databases and project management software programs
- Created and maintained the Distribution Project Manager training manual
- Built relationships with customers to improve their process flow, internally and externally

1997-2005

Operations Manager

Terre Haute, IN

Kadel's Hallmark Holiday Shoppe, Inc.

- Provided excellent customer service
- Created and organized marketing strategies for each quarter, for all media outlets

- Coordinated special events for particular occasions
- Maintained a safe and secure environment for customers
- Conducted detailed inventories and ordering with vendors
- Maintained and balanced cash transactions
- Attended Hallmark A.R.T.S. seminars and Hallmark Management training meetings
- Attended buyer shows, such as the Chicago Merchandise Mart
- Updated and maintained data on POSExpress, Hallmark and other specific product programs

EDUCATION

2000-2004	Saint Mary-of-the-Woods College	Saint Mary-of-the-Woods, IN
	<ul style="list-style-type: none"> ▪ Bachelor of Science ▪ Marketing/Business Major ▪ GPA 3.3/4.0 ▪ Softball team participant, team leader ▪ Studies focused on marketing and business, with emphasis on digital communications and event planning 	

REFERENCES

Jacky Brown
 Vice President of Retail
 3663 Rosecrans Street
 San Diego, CA 92110
 Office: 619-225-2200
 Email: jbrown@sdgoodwill.org

Executive Director

Terre Haute Convention and Visitors Bureau
 5353 East Margaret Drive
 Terre Haute, Indiana 47803
 Cell: 812-249-5563
 Email: david@terrehaute.com

Dr. D.J. Wasmer
 Professor of Business, Department Chair
 006 Hulman Hall
 Saint Mary-of-the-Woods College
 Saint Mary-of-the-Woods, Indiana 47876
 Office: 812-535-5216
 Email: dwasmer@smwc.edu

Matthew Tegtmeier
 Managed Services Manager
 Joink LLC
 834 South 10th Street
 Terre Haute, IN 47807
 Office: 812-235-9008 x1843
 Email: matthew.tegtmeyer@joinkllc.com

David Patterson

CARL W. CONWELL

Terre Haute, IN 47805 • 812-878-1960 • cconwell@wvgoodwill.org

Professional Summary

Focused education professional with master's degree in administration and experience helping students achieve education goals. Talented at building lasting relationships and partnering with others to meet objectives.

Skills

- Public Speaking
- Verbal and Written Communication
- Team Collaboration
- Staff Development
- School Administration
- Lesson Planning
- Operations Oversight
- Program Implementation
- Learning Assessments
- Team Bonding

Work History

Director, The Excel Center, 07/2023 to Current

Wabash Valley Goodwill – Terre Haute, IN

- Cultivated positive relationships between community members, school students, and teachers.
- Trained teachers on effective teaching techniques, classroom management strategies, and behavior modification.
- Performed classroom evaluations to assess teacher strategies and effectiveness.
- Monitored and evaluated educational programs to maintain high-quality performance objectives and standards.
- Administered personnel policies and procedures for school faculty and staff.
- Oversaw schedule management and protocols for orientation, registration, and related activities.
- Collaborated with administration staff to develop functional budgets within allocated funds.

Assistant Principal, 06/2021 to 07/2023

Gibault, Inc. – Terre Haute, IN

- Partnered with principal to administer school program in alignment with vision and goals, providing positive, high-expectation academic environment.
- Monitored student behavior and enforced discipline policies.
- Performed classroom evaluations to assess teacher strategies and effectiveness.
- Supervised and evaluated teaching and support staff through instructional leadership and professional development.

Teacher, 08/2017 to 06/2021

Gibault Children's Services – Terre Haute, IN

- Worked cooperatively with other teachers, administrators, and parents to help students reach learning objectives.
- Incorporated multiple types of teaching strategies into classroom.

Wraparound Facilitator, 09/2015 to 08/2017

Hamilton Center – Terre Haute, IN

- Built solid and trusting rapport with children and families, fostering trust and communication to meet case needs.
- Documented data and completed accurate updates to case records.
- Assisted families in navigating the social services system, including applying for benefits, accessing resources and connecting with other family support services.
- Maintained detailed case histories, metrics and reports to meet strict standards.

Education

Master's in Education: School Administration And Supervision, 05/2023

Indiana State University - Terre Haute, IN

Bachelor of Science: Social Science Education, 05/2011

Indiana State University - Terre Haute, IN

Bachelor of Science: Marketing, 05/2007

Indiana State University - Terre Haute, IN

Lisa R. Walker

7799 North Eppert Street, Brazil, IN 47834

812-239-0033

lwalker@wvgoodwill.org

Objective

To look back on a life that was spent helping others to be the very best they can be, and to grow each day to obtain new experiences and challenges.

Employment History

Human Resources Director

Wabash Valley Goodwill, Terre Haute, IN

Sept 2019 to Present

Meredith Osburn, 812-235-1827

- ❖ Collaborates with executive leadership to define the organization's long-term mission and goals and identifies ways to support this mission through the organization to maintain CARF accreditation for Wabash Valley Goodwill while being in compliance with all state and federal regulations.
- ❖ Serves as a link between management and employees by handling inquiries, resolving work-related problems, mitigating disputes, hiring and termination of employees and administering disciplinary procedures.
- ❖ Oversees, implements, and manages all people related issues, and maintains a Human Capital Management system to track employee information and employee files.
- ❖ Promotes diversity, equity, and inclusivity within the organization.

Student Financial Aid Counselor

Indiana State University, Terre Haute, IN

Supervisor: Sarah Froderman, 812-237-9078

August 2016 to September 2019

Annual Salary: \$30,500

Hours Per week: 37.5

- ❖ Counsel and answer questions from students and parents on financial aid options for higher education during walk-in visits, phone calls and email correspondences.
- ❖ Created and maintained the Client Services Policy and Procedure manual as well as New Staff training manual ensuring that all updates made within federal, state and institution regulations and requirements are known by everyone in the office so that we are compliant across the entire department.
- ❖ Provide assistance to other departments as well as perform other duties as assigned by the Financial Aid Director and Coordinator.
- ❖ Create and deliver presentations to incoming and transfer students and their families about Cost of Attendance (COA), Federal financial aid options and FAFSA Verification.

Human Resource Specialist / IN National Guard Contractor

Odyssey Marketing Group,

Supervisor: James Northcutt, 770-754-9900

September 2014 to August 2016

Annual Salary: \$51,000

Hours per week: 40

- ❖ Worked on the National Guard Employment Engagement Team to help veterans, service members and their families to gain a career where their military and civilian skills could be utilized.
- ❖ Organized Employment Engagement Events throughout the units to provide local companies with top candidates.
- ❖ Partnered with the IN Dept of Veteran Affairs to gain partnerships with companies throughout the state to promote the hiring of military and veterans.

Family Readiness Support Assistant / IN National Guard Contractor

Military Personnel Services Corporation

Supervisor: Rachel Flanders, 571-481-4000

October 2012 to September 2014

Annual Salary: \$38,600

Hours per week: 40

- ❖ Worked directly with the Army unit command staff to assist with execution of the unit's Family Readiness Group (FRG) responsibilities.
- ❖ Served as the conduit for command information and coordination throughout their Major Command
- ❖ Interpreted Army regulation into training documentation and provided training, hands-on assistance and information to unit commanders and family readiness groups and mentored unit FRG volunteers.

Project Manager

Sony DADC, Terre Haute, IN

Supervisor: Dee McClain, 812-462-8100

March 2006-September 2012

Annual Salary: \$41,000

Hours per week: 40+

- ❖ Organized Blu-ray and DVD order for Sony Pictures Home Entertainment and Walt Disney Studios Home Entertainment and see each project through from initial order to the shipment of that order.
- ❖ Managed over 300 DVD and Blu-ray orders and ensured that every part of each order was available, and sent each request to the plan to be manufactured.
- ❖ Worked closely with the customer to ensure all aspects of their experience with Sony DADC was beyond what they needed me to accomplish.

On the Job Training

Wabash Valley Goodwill / Human Resources, Workforce Development and Safety Director

- ❖ FMLA Compliance (Pryor Learning Solutions) December 2019
- ❖ Human Resources for Anyone newly assigned HR responsibilities February 2020
- ❖ OSHA Compliance 2020 March 2020
- ❖ DEI (Diversity, Equity and Inclusion) Toolkit series August 2020-December 2020
- ❖ CARF accreditation May 2021
- ❖ Senior Leader Program Certification October 2022

Indiana State University / Student Financial Aid Counselor

- ❖ Leadership Development : Vital Learning February – June 2019
 - Essential skills of communicating
 - Essential skills of leadership
 - Coaching job skills
 - Communicating Up
 - Delegating
 - Developing Performance Goals and Standards
 - Effective Discipline
 - Improving Work Habits
 - Managing Complaints
 - Providing Performance Feedback
 - Resolving conflicts
 - Supporting change
- ❖ ISU Supervisor Certification August – November 2018
 - Workplace Harassment Prevention for Managers
 - Understanding the Americans with Disabilities Act
 - The Voice of Leadership: Self-Assessment and motivation
 - Strategies for Communicating with Tact and Diplomacy
 - FMLA Leave and More: An overview of legally protected leave
 - Employee relations: Behavioral and disciplinary issues and resolution
 - Equal employee opportunity and lawful hiring
 - Dealing with irrational customer and escalating complaints
 - Diversity on the job: Diversity and you
 - Goals and Setting Goals
 - Time Management: Analyzing your use of time
- ❖ FERPA Laws and Privacy June 2018
- ❖ Financial Aid IT Security Awareness training June 2018
- ❖ It's On Blue (See something, Say something, Step Up) May 2018
- ❖ Title 9: Responsible Employee Training January 2018

IN National Guard Contractor / HR Specialist

- ❖ Dale Carnegie Training: Handling Multiple Time Demands January 2016
- ❖ Dale Carnegie training: Increasing Engagement June 2016

IN National Guard Contractor / Family Readiness Support Assistant

- ❖ Resilience Training Assistant: Comprehensive Soldier and Family Fitness December 2012
- ❖ ASIST: Applied Suicide Intervention Skills Training January 2014
- ❖ DOD PII Training: Identifying and Safeguarding Personal Identifiable Information May 2014
- ❖ Red Cross CPR Certification Training August 2013
- ❖ SAPR Training: Sexual Assault Prevention and Response Training August 2013
- ❖ J9 / Family Programs Trainings 2012-2014
 - Family Resources: Family Assistance; Readiness; Youth Programs; Survivor Outreach; Crisis Intervention Team; Strong Bonds; Military Funeral Honors; Hoosier Youth Challenge Academy.

- Troop Resources: Crisis Intervention Team; Resilience; DEERS and DA Photo Information; INNG Relief Fund; Judge Advocate General; Master Fitness Trainer; Equal Opportunity Office.

Sony DADC / Project Manager

- ❖ Time management training 2011
- ❖ Various trainings on customer service 2006-2012

Education

Indiana State University August 2000 to August 2005
Speech and Language Pathology Bachelor of Science

Terre Haute North Vigo H.S. August 1996 to June 2000
Core 40 Curriculum Diploma

Computer Program Skills

- ❖ Microsoft 365:
 - Microsoft Word
 - Microsoft Excel
 - Microsoft PowerPoint
 - Microsoft Teams
 - Microsoft Outlook
 - Microsoft Publisher
 - Microsoft One Note
- ❖ Skype for Business
- ❖ Ellusion Banner
- ❖ Interaction Desktop
- ❖ Interactive Intelligence
- ❖ COM
- ❖ Oracle
- ❖ Other web-based programs
- ❖ Talisma Campus Nexus CRM
- ❖ Lotus Notes

Community Involvement

Girl Scouts of Central Indiana Volunteer Since August 2016
VCYSA Volunteer Since August 2019
Terre Haute Police Department Spouse Auxiliary Member Since March 2012
Union Christian Church member, praise band lead and service volunteer Since July 1992

Active Memberships

Society for Human Resources Management (SHRM) member Since November 2020
Wabash Valley Human Resources Association member Since November 2019
Leadership Connect West Central Indiana member Since October 2020

DARIN MAY

Fulltime employment that will use my current people skills, leadership skills, and abilities while allowing me opportunities to continue to improve my skills and income.

OBJECTIVE

EXPERIENCE

10/2022 to Present Wabash Valley Goodwill Terre Haute, IN

Director of Workforce Development and Mission

- Responsible for delivery of workforce development services through staff development, market opportunities, and the delivery of quality service consistent with the mission of Wabash Valley Goodwill.
- Responsible for general business operations of Workforce Development Department in a regional area.
- Maintaining program budgets, supervision of staff, coordination of services with partnering agencies, and client support specific to the service.
- Case management, direct training, assessment, goal and job development and implementation.

1999 to 10/2022 Wabash Valley Goodwill Terre Haute, IN

Workforce Development / Human Resources Assistant

- Development of employment and training opportunities for customers and employees.
- Teach and facilitate job readiness workshops and provide one-on one and group counseling to customers to assist them in overcoming employment barriers and choose, change, and adapt to a vocation.
- Track and keep records of all services provided.
- Conduct job fairs. Interview applicants.
- Conduct orientations and onboarding trainings. Organize and conduct safety trainings.
- Organize and conduct safety trainings.
- Oversee and assign duties to employees. Organize, maintain and file employee records.

4/99 to 9/99 Hamilton Center Terre Haute, IN

Employment Counselor

- Developed employment and training opportunities for customers until the state contract ended.
- Taught and facilitated job readiness workshops and provided one-on one and group counseling to customers.

1995 to 1999 Four Rivers Resource Services Sullivan, IN

Employment Specialist

- Developed employment for customers with and without disabilities.
- Worked together with customers through job readiness workshops, one-on one and group counseling, and job coaching to assist them in overcoming employment barriers and choose, change, and adapt to a vocation.
- Write and submit proposals for state IMPACT contracts.
- Oversee and assign duties to clerical staff and interns.

1984 to 1997

May Family Farms Inc.

Sullivan, IN

Owner/Operator

- All aspects of planting, tending, and harvesting corn, soy beans, and wheat.
- Operated and maintained heavy machinery such as combines, semi-tractor trailers, four wheel drive farm tractors, and grain handling systems.
- Marketing and sales of grain.
- Hiring and supervision of employees.

1999 to 2005

Wabash Valley Christian Youth Camp

Terre Haute, IN

VOLUNTEER

Director/Board of directors

- Recruit, oversee, and direct a staff of 25 or more cabin counselors, teachers, cooks, and activity directors.
- Develop and teach curriculums and activities, coordinate and direct a full week of youth camp for up to 100 children per week, ages 8 to 18.

EDUCATION

1989

Purdue University

Lafayette, IN

- Graduated/Agriculture

1997

Indiana University

Bloomington, IN

- Graduated/Employment Specialist Training.
-

Daniel A. Davis

5065 South Morris Place, Terre Haute, IN 47802, Phone #812-208-9860

ddavis@wvgoodwill.org

Objective: To enhance my leadership and developmental skills in order to advance and broaden my position.

Skill Highlights

- Mission oriented
- Dedicated
- Creative
- Self-motivated
- Time management skills
- Decision making
- People oriented
- Punctual
- Staff training and development
- Forward thinking and forecasting
- Policy development and implementation
- Distribution and inventory control
- Project planning and coordinating
- Leadership and development skills
- Loss prevention

Work Experience

Logistics and Safety Director

Wabash Valley Goodwill

June 2022 – Present

- ❖ All responsibilities remain the same as stated in my previous position, however, this position has added responsibilities.
 - Reports incidents to workers comp insurance provider as necessary.
 - Reports information to general liability provider regarding claims as necessary
 - Conducts facility inspections looking for defects and safe operating practices
 - Disseminates safety-oriented information to all team members
 - Conducts a quarterly Safety Committee meeting
 - Assists with payroll management systems and timekeeping
 - Oversee aftermarket operations

Director of Operations and Business Development

Wabash Valley Goodwill

January 2017 – June 2022

- Directs the activities of the Production, Transportation, Janitorial and Facilities/Grounds Maintenance departments
- Manages a team of 70 + team members including supervisors, Commercial Motor Vehicle drivers and equipment operators
- Provides instruction, training and guidance to all team members
- Reports directly to the President and CEO
- Performs functions such as hiring, terminations and coaching with Human Resources support
- Responsible for ensuring compliance to all federal, state, local, OSHA, FMCSA, DOT and ADA guidelines, laws, rules and regulations
- Develops, writes, implements and disseminates policies, procedures and safe operating practices

- Ensures that all team members are adhering to policies and procedures
- Maintains driver personnel files
- Maintains fleet maintenance records
- Schedules service as needed for all vehicles and equipment
- Responsible for fleet safety and maintenance
- Assists with Loss Prevention utilizing available tools such as surveillance systems
- Travels to all properties operated by WVG to conduct on-site audits ensuring compliance to applicable laws, policies, procedures and safety practices
- Schedules and coordinates with contractors and vendors
- Manages work order system and tracking
- Delegates tasks, duties and responsibilities to team members
- Completes performance evaluations
- Engages in community events
- Communicates with commodity vendors to ensure that fair market price is being paid
- Attends Goodwill seminars and other associated training
- Trained in Kaizen method and implemented in production processing area at the flagship location
- Attends and participates in quarterly WVG board meetings
- Attends and participates in monthly Executive Committee, Finance Committee and Technology Committee meetings
- Assists with organizational growth and expansion
- Assists the President and CEO with the creation of the annual organizational operating budget
- Responsible for fiduciary duties that include reviewing all organizational expenses and authorizing payment, being an authorized corporate check cosignatory, corporate purchasing agent, co-authority for all corporate accounts i.e. investment accounts, safety deposit box; seek consultation from financial expert as need to make financial based decisions in the absence of the President and CEO, review P&L statements, determine best financial practices to maintain financial solvency

Transportation and Recycling Supervisor

Wabash Valley Goodwill

June 2013 - January 2017

- Directed all activities within the transportation and recycling departments
- Reported directly to the President and CEO
- Supervised CMV driver's, equipment operators and numerous support staff
- Responsible for daily operations and scheduling of the recycling staff
- Coordinated with the Executive Assistant to schedule transportation of recycle and salvage commodities
- Operated CMV as needed (Box truck, truck and trailer)
- Received "Train the Trainer" course to become an OSHA certified equipment operator training instructor
- Trained and certified select team members to operate fork trucks and skid-steer
- Provided training to all CMV drivers
- Administered DOT regulated road test to all CMV drivers
- Ensured that all team members were adhering to policies and procedures
- Maintained all driver personnel files
- Scheduled and coordinated daily activities such as store service, donation drives, commercial and residential donation pick-ups, etc.

- Completed evaluations for all team members
- Responsible for inventory of donations in storage, shipping and other operating supplies
- Managed and performed various maintenance tasks
- Interviewed and hired drivers and recycling staff with Human Resources support

Driver / Equipment Operator

Wabash Valley Goodwill

May 2005 – June 2013

- Drove CMV to satellite stores for freight delivery and removal of any overflow donations or salvage items
- Drove CMV to scheduled donation drives and commercial/residential pick-ups
- Obtained and maintained a valid “For Hire” license
- Responsible for a small team
- Reported to the Production Supervisor
- Obtained DOT physical in accordance to DOT regulations to be able to operate a CMV
- Assisted donors with the unloading of their donations and provided tax receipts as requested
- Assisted with facilities/grounds maintenance
- Provided feedback to appropriate supervisor
- Operated in accordance to DOT regulations
- Completed various written reports as required
- Conducted daily equipment inspections to ensure safe operation and reported faults as needed
- Conducted monthly facility inspections and reported faults as needed

Irrigation Sales and Installation/Landscape Installation

Landscapes by Dallas Foster, Inc.

April 1998 - January 2004

- Communicated with clients to determine their needs
- Resolved conflicts as needed
- Measured applicable areas to provide quotation of irrigation system installation
- Created schematic for visual illustration
- Calculated quantity of materials needed, required equipment and labor hours needed
- Provided written estimate to company owner for review and approval, then submitted to client
- Responsible for inventory of materials, tools and equipment
- Ensured that projects remained within budget
- Scheduling of project phases - coordinated with other departments, contractors
- Operated a variety of equipment and vehicles based on project requirements
- Supervised small team and instructed others as needed
- Possessed trouble shooting skills

Education & Certificates

Sullivan High School

Graduated mid-term December 1993

Valid “For-Hire” State Issued Operators License

Train the Trainer Instructor Certificate

Current DOT Physical

References

Meredith Osburn
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Glenn Houser
901 Poplar St.
Terre Haute, IN 47807
812-238-1129 *Office*
ghouser1957@gmail.com

BETSY K. DELGADO

Cell: 317.605.4253 Email: bdelgado@alumni.nd.edu

COMMITTEES & BOARDS

- National Research Dissemination Committee- Laboratory of Economic Opportunity, University of Notre Dame
- National Post-secondary Task Force, Aspen Institute
- Governor Appointed Chair, Indiana Early Learning Advisory Committee
- EmployIndy Workforce Board, Indiana
- Career Pathways Task Force, Indiana Career Council
- Racial Equity and Civility Committee, Indianapolis Mayor's Office

PUBLICATIONS AND NATIONAL PRESENTATIONS

- *Scaling Up, Scaling Out* - <https://ascend.aspeninstitute.org/resources/scaling-up-scaling-out/>
- *Excel Center Strategic Plan for National Expansion*
https://issuu.com/goodwillindy/docs/the_excel_center_strategic_plan_for_national_expansion
- *Research Report: The Excel Center*- University of Notre Dame, Indiana University and Ball State
- *Excel Center Report to the Nation* - Yearly publication
- *Uncomfortable Truths, Healing Impact* - Panel with Van Jones, CNN, <https://youtu.be/5eJaCgTrcKw>
- *2 Gen for Tennessee* – Guest Speaker on the topic of Whole Family Education and Change
- *Getting to Scale*, Ascend Fellows – Presented our publication
- *Investments for Generations*, National Conference of Legislators
- *The Father Factor: Fatherhood Forum*, The Aspen Institute
- *Wrapping around the Student Parent*, Kresge Foundation
- *Supporting Student Parent Families in a Time of Crises*, The Aspen Institute
- *Presentation to the Laboratory for Economic Opportunity Board*, University of Notre Dame
- *Excel Center Panel/USC Reception*, University of Notre Dame
- *Promoting Entrepreneurship and a 21st Century Workforce Based on Evidence*- Panel with Paul Ryan and the American Idea Foundation

BETSY K. DELGADO

Cell: 317.605.4253 Email: bdelgado@alumni.nd.edu

EDUCATION

Executive MBA, Business and Strategy

University of Notre Dame

Bachelor of English and Education

University of North Dakota

Ascend Fellow

Aspen Institute

Executive Development Program

Goodwill Industries International

JAYLYN BROWN
Silver Spring, MD 20901
812-746-5554 jaylynbrown71@gmail.com

EDUCATION

INSTITUTE FOR EDUCATIONAL LEADERSHIP Washington, D.C.
Education Policy Fellowship Program 2022-2023

LOYOLA UNIVERSITY CHICAGO Chicago, IL
Master of Arts, Cultural and Educational Policy Studies 2016-2018

INDIANA STATE UNIVERSITY Terre Haute, IN
Bachelor of Science 2011-2015

PROFESSIONAL EXPERIENCE

GOODWILL EDUCATION INITIATIVES Remote
Policy, Research and Advocacy Manager 2021-Present

- Conduct policy research and analysis of multiple state education statutes and regulations that impact our school model
- Present findings and provide recommendations to partners that prepare them for legislative session
- Educate elected officials, state agencies, and community partners through written and verbal communications regarding our school model

BRIGHT STAR COMMUNITY OUTREACH Chicago, IL
Program Manager-Education 2018-2021

- Lead and managed program outcomes, program development, and staff instruction of OST programming in middle and high schools
- Coordinated with other departments and key stakeholders on outreach, student intervention, technical assistance, and program development.
- Communicated with families and local education agencies on available services related to financial literacy, mental health, employment, and youth enrichment.

SAGA EDUCATION Chicago, IL
Math Lab Fellowship- University of Chicago Charter School 2015-2016

- Provided high dosage math tutoring to high school students and created lesson plans to meet the needs of students
- Generated weekly student progress reports for department meetings and parent communications.

INDIANA STATE UNIVERSITY-Department of Applied Medicine Terre Haute, IN
Research Assistant-Science Education 2012-2015

- Researched and created interactive, physiological models for elementary school students
- Presented research findings at the Experimental Biology Conference and National Conferences on Undergraduate Research for two consecutive years

VOLUNTEER EXPERIENCE

Youth Guidance Chicago, IL
Advisory Committee Member 2019-2020

Katie Bustamante

Home Address
306 E. Stoneridge Dr
Milford, OH 45150

Contact Information
(513) 702-2991
katiemorgan425@gmail.com

Objective

To obtain a position with an organization where I can utilize my leadership, communication, planning and organizational skills and experiences to contribute to the growth and success of the organization and its clients.

Work Experience

The Excel Center National Office – Senior Director

The Excel Center National Office – Regional Director

November 2020-Present

- Supported in the creation and execution of The Excel Center National Office strategic plan
- Managed and supported at team of three individuals leading to the growth of The Excel Center National Network including 20 Goodwills operating Excel Centers or in phase work
- Developed and executed professional development programming for Goodwill and Excel Center staff.
- Managed and supported Goodwill leadership teams in 5 phases of opening an Excel Center leading to 40 network schools open in 9 states and Washington DC.

The Excel Center National Office - School Development Director March 2018-November 2020

- Developed and executed professional development programming for Excel Center staff leading successful opening of 3 Excel Centers.
- Organized The Excel Center National Conference for over 30 schools including both in person and virtual events
- Supported the growth and improvement of The Excel Center nationally through development such as mock charter reviews, leadership professional development and ELL training.

The Excel Center West – School Director

July 2015-March 2018

Indianapolis, IN

- Responsible for a school of approximately 370 diverse, adult learners driven with the mission of providing a quality education to empower people to increase their independence and reach their potential through education and employment.
- Planned and executed professional development to grow staff in their ability to support our adult students who represent over 40 countries and 26 languages.
- Developed long term calendar, schedule and course alignment for adult charter school.
- Managed staff of 22 teachers, coaches and support staff
- Oversaw over \$2 million budget and daily operations for an extremely diverse and unique high school for adults seeking a core 40 high school diploma.
- Developed staff members leading to 5 staff members earning promotions within the first two years as Director.
- Increased school grade from a “B” to an “A” between first and second year as director with an increase of 18 graduates from 2015-2016 to 2016-2017 school year.

- Collaborated with local schools, businesses, agencies and nonprofits to connect students and graduates to resources and further mission development.

The Excel Center West – College and Career Readiness Coordinator July 2013-July 2015
Indianapolis, IN

- Oversaw and mentored students in CCR program leading to 23 graduates in first year, 68 in year 2.
- Organized and implemented college and career readiness program leading to 32 dual credits earned and 42 work industry certifications.
- Organized and implemented graduate teams to assist in graduate support.
- Organized, executed and oversaw orientation and recruitment events leading to the recruitment of over 50 students.
- Mentored over 80 students in areas of scheduling, classes and life issues

George Washington Community High School - Teacher July 2010-June 2013
Indianapolis, IN

- Taught 7th, 8th, and 9th grade English, Journalism and College Readiness to over 100 students a year.
- Selected member and minute keeper of Instructional Leadership Team 2012.
- Organized, developed and oversaw materials, plans and execution for all school remediation classes.
- Planned and executed lesson plans, turn around process and data analysis as selected member of 8-step data team.
- Developed, created and oversaw 15 member student council, executed field day for over 500 students and staff.
- Assistant varsity and middle school volleyball coach, varsity swim coach.

Teach For America Corps Member July 2010-May 2012
Indianapolis, IN

- Selected member, one of 46,000 applicants, 2010-2012
- Taught 7th -9th grade English, Journalism and College Readiness to a very diverse population in Indianapolis Public Schools.
- Planned and executed English professional development for 30 first and second year teachers as an alumni.

Kicks For Kids Intern Summer 2009
Cincinnati, OH/Covington, KY

- Organized, planned and executed fundraising events such as the KFK/Meijer golf classic utilizing celebrity participants and social networking media such as Twitter to increase participation. 2009 event netted over \$400,000.
- Created a marketing campaign using social networking media such as Facebook and Email to generate participation in fundraising events to the greater Cincinnati community such as KFK basketball camp.

WMSR - News Director
Oxford, OH

Fall 2008 to Spring 2009

- Directed news team of 10 associates and served on executive board.
- Managed and assigned stories to news team members, hosted a radio weekly show.

Education

Butler University, Indianapolis, IN graduation December 2015

- Masters of Science in Educational Administration (EPPSP program)
- Building Administrator License

Marian University, Indianapolis, IN graduation May 2012

- Masters of Arts in Teaching
- Secondary ELA and Reading License

Miami University, Oxford, OH graduation May 2010

- Bachelors of Arts in Journalism
- Bachelors of Arts in American Studies
- Miami University Scholar

Leadership/Awards Experience

Senior Leader Program at Goodwill Industries International, October 2019 to August 2020

Chapter Advisor for Mu chapter of Kappa Kappa Gamma, July 2014 to January 2017

- Volunteered to mentor chapter council made up of approximately 20 college aged women at Butler University.
- Coached members through conflict resolution, decision making and diplomatic relations.

Kappa Kappa Gamma Fraternity Chapter President, Jan. to Dec. 2009

- Oversaw operation of entire chapter of 160 women, 2nd largest at Miami University
- Generated and implemented ideas for fundraising, educational programs and social programs
- Led budget team in allocating the chapters \$150,000 annual budget

Society of Professional Journalists, Mark of Excellence Award, 2011

- Received the national award for in-depth radio reporting –Tracking Stimulus Dollars in Southwest Ohio played on Cincinnati's NPR affiliate

Khalilah R. Palmer

10428 Bellchime Court, Indianapolis, IN 46235 – (317) 775-5276 – Khalilahpalmer70@gmail.com

Objective

Passionate, energetic school leader with a wealth of experience in multiple roles seeks a position in which she can influence and encourage all phases of national school development.

Education

Master's in Educational Leadership, Indiana University, Indianapolis, IN June 2016
Emphasis: Urban Educational Leadership
State of Indiana teacher's license in business education (7-12)

Master of Business Administration, Indiana Wesleyan University, Marion, IN August 2000

Employment and Experience

School Development Director

GEI, The Excel Center National Office

April 2021- Present

- Collaborate with the national director and school director to develop and execute professional development
- Provide training and regular mentoring to TEC Network life coaches, and college and career readiness coaches; instructional staff, including lead teachers; and office staff, including registrar and childcare directors
- Work closely with the National Director to maximize the support services available to the licensee, including those available through GEI's Central Office staff
- Assist the school director and lead teacher with implementing staff evaluation system
- Create and modify curricular and instructional materials as needed
- Work closely with the national director to provide continued monitoring and support to TEC Network schools to ensure quality control accountability, best practices

School Director

The Excel Center Shelbyville, Goodwill Education Initiatives, Indianapolis, IN

June 2016 – April 2021

- Led the entire process of opening a new school in 30 days while securing a temporary building for learning to occur
- Collaborate with mayor and other city and county leaders to determine the greatest needs of adult learners in the area and how the school can serve those needs
- Led a school that earned an "A" rating in each of its first four years
- Recruited and serve students from Shelby, Decatur, Rush, Fayette, Hancock, and Johnson counties
- Maintained a school enrollment of 155 after having started with a projected maximum enrollment of 115
- Overseen all daily operations of the school, including fiscal matters to ensure that the school operates in the black
- Hired, supervised, and evaluated leadership team and coaching and teaching staff
- Maintained a strong, interdependent network with local political, business, and industry leaders through active participation in Shelbyville Community Networking meetings, Leadership Shelby County events, Shelbyville Chamber of Commerce events, and The Excel Center Shelbyville's Community Advisory Team
- Hosted St. Louis, Missouri, and Little Rock, Arkansas, school development teams, including school staff, corporate leaders, and legislators, as they explored The Excel Center Shelbyville's small school model
- Maintained a graduation rate of 100%, with 93% of all graduates earning one or more of fourteen industry-recognized certifications offered
- Assisted in creation of a CCMA certification partnership with MHP Hospital, resulting in a 100% pass rate among student and graduate participants and the hiring of those certification earners
- Facilitated opportunities for professional development of entire team at the corporate, local, state, and national levels
- Led team in achieving Indiana Charter School Board's approval for 5-year accreditation renewal in 2020

Khalilah R. Palmer

Leadership Team Member, College and Career Readiness Specialist/Career Education Teacher/Graduate Coach
The Excel Center Franklin and Meadows, Goodwill Education Initiatives, Indianapolis, IN June 2012-June 2016

College and Career Readiness Specialist:

- Served on the team that opened The Excel Center Franklin location while recruiting students
- Assisted over 80% of graduates in finding gainful employment and/or gaining college admission
- Secured certification programs based on student interests and employment outlook projections
- Provided students with college and career counseling
- Initiated new community contacts and cultivated business relationships
- Co-taught a course designed to help students transition to college and/or a career
- Collaborated with a team of 11 college and career readiness specialists to grow new certification and college and career exploration opportunities
- Trained new College and Career Readiness specialists from expansion sites

Career Education Teacher:

- Taught Hire Technology certification program and Ivy Tech dual credit courses in business and marketing
- Created thought-provoking, interactive lessons plans that were differentiated according to student needs
- Ensured that all lesson plans fulfilled the State of Indiana Academic Standards

Graduate Coach:

- Served as liaison between potential graduates and school staff
- Collaborated with lead coach to conduct Senior Seminar
- Managed and advocated for a caseload of 20 graduates
- Ensured that students earned the Indiana Core 40 diploma by meeting all credit requirements and passing the state-mandated End-of-Course Assessments

Life/Academic Coach

The Excel Center Michigan/Goodwill Education Initiatives, Indianapolis, IN June 2010 - July 2012

- Served as a member of the founding staff of the first Excel Center in the nation
- Encouraged 60 students' academic progress, attendance, and ability to overcome life barriers such as homelessness, criminal background, childcare issues, and drug abuse issues
- Conducted weekly cohort group meetings in which a holistic approach was used while facilitating lessons to assist students with becoming successful socially, academically, and in employment situations
- Wrote lesson plans for all cohort group meetings and ensured that they met State of Indiana Academic Standards so that students could earn credit in "Career Planning and Success"
- Created procedures, documents, and recognition programs, including schedule request form, attendance tracking sheet, food pantry voucher, cohort room availability chart, goal tracking sheet, and student recognition breakfast
- Assisted in creation of orientation process, attendance acceptability criteria, student request form for financial resources, coaches' handbook, employee evaluation form, employee handbook, and student recognition poster
- Wrote grant for student resources and connected students to several local resources.
- Developed and cultivated relationship with United Way, which resulted in 12 students receiving Christmas funds
- Conducted job readiness seminar for 15 students, including sessions on how to prepare for employment, conduct a career search, and maintain employment

Activities and Awards

- Member of the Goodwill of Central and Southern Indiana Cultural Action Team 2020-present
- Ten-year service award at Goodwill Industries/Goodwill Education Initiative 2020
- Coalition on Adult Basic Education national conference attendee 2018 and 2019
- The Excel Center National Conference presenter of five sessions focused on the small school model, ensuring solid relationships with community stakeholders, creating a school-wide emphasis on students' employability skills, and establishing partnerships with certification providers 2018-present

Sarah Thomas, MA

sapennal@gmail.com

WORK EXPERIENCE

Goodwill Network **Indianapolis, IN; Houston, TX; Remote (August 2012- Present)**

National Excel Center Business Development & Advancement Director; Manager of Grants, Special Events; Foundation Relations

- Executes the scaling plan for The Excel Center by leading the team developing advocacy plans at the state and federal level
- Engages local and national leaders in conversations related to high-quality education and training options for adults
- Designs, facilitates and trains staff on the process to identify, qualify, solicit and steward grant funding from private foundations and government entities, resulting in more than \$52,000,000 in fundraising
- Develops and maintains relationships with grant funders, community partners, and internal and external stakeholders
- Facilitated the selection process for awarding \$100,000 in traditional and nontraditional scholarships annually
- Implemented and managed the configuration of Blackbaud Grantmaking database

New York YMCA Camps **Huguenot, NY (Summer 2012)**

American Camping Association (ACA) Standards Coordinator

- Audited camp policies and practices to ensure compliance with 175 ACA safety standards – 98% pass rate
- Facilitated communication between multiple levels of camp staff to ensure all ACA safety standards were met & documented

Camp Talcott Program Director

- Scheduled, implemented and supervised activities of 35 staff and 200 campers per week
- Co-facilitated and designed staff training

Youth Villages **Memphis, TN (June 2011-April 2012)**

Overnight Teacher Counselor YV360 Development Program

- Coordinated and organized the daily schedule for 10 male adolescent youth in residential treatment for physical aggression
- Taught life skill activities and assisted in group therapy to facilitate successful rehabilitation for each child
- Earned Overnight Teacher Counselor of the Quarter Award

Fairview Elementary/Indiana University Center for Innovative Teaching **Bloomington, IN (August 2008- May 2011)**

Advocate for Community Engagement

- Served as a liaison between IU professors and Fairview faculty to match volunteers with the needs at Fairview Elementary
- Recruited and oriented volunteer assistance for tutoring, recess, and classroom help while recording all relevant data
- Lead class/community presentations for recruitment and updated website with volunteer opportunities

VOLUNTEER EXPERIENCE

Champions Creek Homeowners Association **2019**

Director at Large

- Monitor financial statements, budgeting, and architectural requests for a homeowner's association comprising 252 homes.

YMCA of Greater Indianapolis, Flat Rock River YMCA Camp **St. Paul, IN (January 2015-September 2017)**

Alumni Campaign Chair

- Recruited and led volunteer campaign workers with diverse experience in fundraising
- Created written and video case for support and designed direct mail piece for growing camp alumni donor base
- Ensured proper donor recognition by organizing personal acknowledgements and the end-of-campaign celebration

EDUCATION

Indiana University-Purdue University Indianapolis **Indianapolis, IN (2012-2014)**

Masters in Philanthropic Studies GPA 3.9/4.0

Graduate Certificate in Nonprofit Management

Indiana University **Bloomington, IN (2007- 2011)**

Bachelors of Science in Sociology and German 3.8/4.0

Nonprofit Leadership Alliance Certified Nonprofit Professional

Minor in Gender Studies

Attachment 2 – Statement of Economic Interest & Conflict of Interest Form

This attachment contains Board Member Statement of Economic Interest & Conflict of Interest forms from the following individuals:

- Betsy Peperak
- John Lukens
- Kristin Craig
- Leah Allman
- Rene Hankins
- Mary Halstead
- Ryan Keller

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

2. Your full name:

Betsy Peperak

3. Your spouse's full name:

Matthew Peperak

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty-three (33%) of their income"):

RJL Solutions - advocacy and marketing firm

6. List the name(s) of your spouse's employer(s) and the nature of the business:

Wiese - equipment repair

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice?

No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company?

No.

Yes. Please provide the name and describe the nature of the business:

9. Are you and/or your spouse an officer or director of a corporation?

No.

Yes. Please provide the name and describe the nature of the business:

RJL Solutions, Chief Operating Officer, advocacy and marketing firm

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

Kristin Craig, Terre Haute Chamber of Commerce, client of RJL Solutions
Ryan Keller, Thrive West Central, client of RJL Solutions
Wabash Valley Goodwill - client of RJL Solutions

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

No.

Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

Not applicable.

No.

Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

No.

Yes. Please describe the relationship and the nature of the partnership:

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

No.

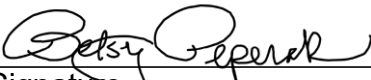
Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?
- Yes.
- Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Betsy Peperak

Name


Signature

08/21/2023

Date

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school or whose governing board you serve:

Excel Center School

2. Your full name:

John Sherer Lukens

3. Your spouse's full name:

Karen Elizabeth Lukens

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

Graduated UI School of Business 1976
Employed at Forrest Sherer Insurance 1977-2020. Served as commercial sales rep, sales manager and CEO
Served on Union Hospital Board for 22 years, 8 years as Board Chair
Served on local Goodwill Board for over 25 years

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty three (33%) of their income");

Retired 2020

6. List the name(s) of your spouse's employer(s) and the nature of the business:

NA

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice?

No

Yes. Please provide the name and describe the nature of the business:

NO

8. Are you and/or your spouse a member of a partnership and/or limited liability company?

No

Yes. Please provide the name and describe the nature of the business:

Lukens LLC is a family property ownership organization

9. Are you and/or your spouse an officer or director of a corporation?

No

Yes. Please provide the name and describe the nature of the business:

NO

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

NO

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

NO

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

NO

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

NO

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

No.

Yes. Please provide a description of the interest:

NO

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

Not applicable.

No.

Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

No.

Yes. Please describe the relationship and the nature of the partnership:

NO

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

No.

Yes, Please describe the nature of the potential conflict(s):

NO

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?

Yes.

Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

____John S Lukens____

Name

8/22/23

Signature Date



Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

Excel Center of West Central Indiana

2. Your full name:

Kristin Craig

3. Your spouse's full name:

David Scott Craig

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty-three (33%) of their income"):

Terre Haute Area Chamber of Commerce, Inc. - Nonprofit membership organization

6. List the name(s) of your spouse's employer(s) and the nature of the business:

Cox, Zwerner, Gambill & Sullivan, LLP - Attorney

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice? No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company? No.

Yes. Please provide the name and describe the nature of the business:

Cox, Zwerner, Gambill & Sullivan, LLP - Attorney

9. Are you and/or your spouse an officer or director of a corporation? No.

Yes. Please provide the name and describe the nature of the business:

Terre Haute Area Chamber of Commerce, Inc - Nonprofit membership organization
Greater Terre Haute Chamber of Commerce Foundation, Inc - Charitable organization
United Way of the Wabash Valley - Nonprofit organization

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

As the Executive Director of the Terre Haute Chamber of Commerce, a membership-based organization that represents the interests of the business community, I have many business relationships with a large variety of companies who will likely interact with the school.

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

No.

Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

Not applicable.

No.

Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

No.

Yes. Please describe the relationship and the nature of the partnership:

As the Executive Director of the Terre Haute Chamber of Commerce, a membership-based organization that represents the interests of the business community, I have many business relationships with a large variety of companies who will likely interact with the school.

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

No.

Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?

Yes.

Don't Know/ Unsure

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Kristin Craig

Name

Kristin Craig

Signature

8/22/23

Date

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

Excel Center - Terre Haute

2. Your full name:

Leah Allman

3. Your spouse's full name:

Craig Allman

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty-three (33%) of their income"):

Ivy Tech Community College - Terre Haute/Greencastle

6. List the name(s) of your spouse's employer(s) and the nature of the business:

Industrial Supply Company

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice? No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company? No.

Yes. Please provide the name and describe the nature of the business:

9. Are you and/or your spouse an officer or director of a corporation? No.

Yes. Please provide the name and describe the nature of the business:

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

No.

Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

Not applicable.

No.

Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

No.

Yes. Please describe the relationship and the nature of the partnership:

I work for Ivy Tech and there may be a partnership with dual credit courses.

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

No.

Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?

Yes.

Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Leah Allman

Name

Leah Allman

Signature

08/21/2023

Date

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

Wabash Valley Goodwill Excel Center

2. Your full name:

Rene Hankins

3. Your spouse's full name:

Aaron Hankins

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty-three (33%) of their income"):

Rose-Hulman Institute of Technology - Higher Education

6. List the name(s) of your spouse's employer(s) and the nature of the business:

Hendrick's and Company - Logistics and Warehousing - Accountant

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice? No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company? No.

Yes. Please provide the name and describe the nature of the business:

Mark Properties, LLC - Real Estate Investment

9. Are you and/or your spouse an officer or director of a corporation? No.

Yes. Please provide the name and describe the nature of the business:

Vice-President of Finance at Hendrick's and Company

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

No.

Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

Not applicable.

No.

Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

No.

Yes. Please describe the relationship and the nature of the partnership:

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

No.

Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?

Yes.

Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Rene Hankins

Name

Rene Hankins

8-22-2023

Signatur

Dat

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

Excel

2. Your full name:

Mary Hollington Halsted

3. Your spouse's full name:

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

B.A. in Russian Studies - University of Michigan
Graduate studies at UM and Wayne State University
Employment with Michigan Employment Security Commission (Detroit)- 3 years
Triton Corporation (Flint, MI) Engineer Recruiter - 2 years
Union Hospital (Terre Haute, IN) Human Resource Mgr. - 20 years
Volunteer experience with Union Hospital, Symphony League, Centenary UMC,
Westminster Village Exec. Council, Goodwill of Wabash Valley Board.

5. List the name(s) of your current employer(s) and the nature of the business (an "employee" is defined as "any person from whom the board member or the board member's spouse receives more than thirty-three (33%) of their income"):

Retired,

6. List the name(s) of your spouse's employe(e) and the nature of the business:

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice?

No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company?

No.

Yes. Please provide the name and describe the nature of the business:

9. Are you and/or your spouse an officer or director of a corporation?

No.

Yes. Please provide the name and describe the nature of the business:

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship:

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

No.

Yes. Please identify the business and indicate the nature of the relationship:

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

No.

Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

Not applicable.

No.

Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

Not applicable.

- No.
- Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

- Not applicable.
- No.
- Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

- No.
- Yes. Please describe the relationship and the nature of the partnership:

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

- No.
- Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?

- Yes.
 Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Mary S Halsted

Name

Mary S Halsted

8/18/2023

Signature

Mary S Halsted

Date

Exhibit C

Statement of Economic Interest & Conflict of Interest Form

(Must be completed individually by each Board member)

Background Information

1. Name of charter school on whose governing board you serve:

Goodwill Excel Center - Terre Haute

2. Your full name:

Ryan Joseph Keller

3. Your spouse's full name:

Patrica Nichole Keller

Employment History

4. Brief educational and employment history (no narrative response is required if your resume is attached to the charter application).

My resume is attached.

My resume is not attached. Please provide a narrative response:

8/2019 - Present - Executive Director of West Central Indiana Economic Development District, Inc. d/b/a Thrive West Central
04/2016 - 7/2019 - Chief Operations Officer - Certall, Inc.
10/2015 - 10/2017 - Co-owner Kaleidoscope Leadership Development, LLC
01/2013 - 05/2018 - School of Business Program Chair and Instructional Development Manager
08/2009 - 03/2013 - Greencastle Community School Corp. - HS Life Science Teacher

I have a background in K-18 education, technology, leadership, and non-profit management.

5. List the name(s) of your current employer(s) and the nature of the business (an "employer" is defined as "any person from whom the board member or the board member's spouse receives more than thirty percent (33%) of their income"):

West Central Indiana Economic Development District, Inc. d/b/a Thrive West Central. Nature of business: economic and community development, area agency on aging and disabled services, rural transit, and housing.

6. List the name(s) of your spouse's employer(s) and the nature of the business.

Clay County Government; My wife is the County Recorder.

7. Do you and/or your spouse currently operate a sole proprietorship or professional practice?

No.

Yes. Please provide the name and describe the nature of the business:

8. Are you and/or your spouse a member of a partnership and/or limited liability company?

No.

Yes. Please provide the name and describe the nature of the business:

9. Are you and/or your spouse an officer or director of a corporation?

No.

Yes. Please provide the name and describe the nature of the business:

Ryan Keller - Thrive West Central. Economic and community development.

Conflict of Interest Disclosures

1. Do you or your spouse have a personal or business relationship with any other board member for the proposed school?

No.

Yes. Please identify the board member and indicate the nature of the relationship.

2. Do you or your spouse have a personal or business relationship with anyone who is conducting, or who plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity)?

- No.
 Yes. Please identify the business and indicate the nature of the relationship:

3. Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the school?

- No.
 Yes. Please describe the nature of the business that is being, or will be, conducted:

4. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a personal or business relationship with any employees, officers, owners, directors or agents of the service provider?

- Not applicable.
 No.
 Yes. Please describe the relationship:

5. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members have a direct or indirect ownership, employment, contractual or management interest in the service provider?

- Not applicable.

- No.
 Yes. Please provide a description of the interest:

6. (If the school intends to contract with an Education Service Provider). Do you, your spouse, or any immediate family members conduct, or anticipate conducting, any business with the provider?

- Not applicable.
 No.
 Yes. Please describe the nature of the business:

7. Are you, your spouse, or any other immediate family members, a director, officer, employee, partner or member of, or are otherwise associated with, any other organization that is partnering, or plans to partner, with the charter school?

- No.
 Yes. Please describe the relationship and the nature of the partnership:

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

- No.
 Yes. Please describe the nature of the potential conflict(s):

9. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law and the Access to Public Record Act?
- Yes.
- Don't Know/ Unsure.

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above charter school is true and correct in every respect.

Ryan J. Keller

Name

Ryan J. Keller

Signature

08/21/2023

Date

Attachment 3: Core Curriculum Scope & Sequence

MATHEMATICS

The Excel Center’s mathematics curriculum aligns to Indiana Academic Standards for Mathematics and the Standards for Mathematical Practice, standards grounded in evidence and designed to ensure that all students have the academic knowledge and skills they need to succeed after high school. The Excel Center mathematics program follows the two major evidence-based design principles of the standards for mathematics: focus and coherence. This results in a deep and rigorous curriculum, and one in which students acquire conceptual understanding, procedural skills and fluency, and the ability to apply mathematics to solve problems. Additionally, these math courses each incorporate social-emotional learning standards, employability skills, and justice skills, including diversity, equity, and inclusion. The Excel Center mathematics courses are designed to meet learners where they are by offering remedial courses for basic skills credits and developing student skills through mastery that allows them to move through the high school curriculum. Math Foundations and Pre-Algebra courses are aligned to Indiana Academic Standards for math in Grades 5-8 to help students reach a readiness for Algebra I standards and beyond. These remedial courses utilize mastery-based approaches to instruction and incorporate multiple modes of learning and technology to propel students toward mastery. After remedial courses, a student progresses to Algebra I and beyond, earning high school credits toward graduation. Geometry introduces the tools central to the study of space and spatial relationships, including transformations, proof, and constructions. Algebra II extends the knowledge students have of algebraic and statistical concepts. They have investigated linear, exponential, and quadratic functions in previous years, and Algebra II further develops important mathematical ideas introduced in Algebra I by extending techniques to solve equations and students’ knowledge of functions by studying inverses and new function families. Students may take a fourth-year math course, the selection of which will align with their college and career pathway.

COURSE TITLE Standard Course Length	<i>Credit Type</i> Quantity - # DOE CODE	Prerequisites / Notes
Math Foundations MATH FOUND 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 0500 BAS SKLS: MATH /4w	
PREALG 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 0500 BAS SKLS: PREALG /4w	
ALGEBRA I 180m/8w (or 90m/8w IA & IB)	<i>Mathematics</i> 1 - 2520 ALG I /4w (or /8w IA & IB) <i>General Electives</i> 1 - 2516 ALG I LAB /4w (or /8w IA & IB)	Exact Path Quantile Score: 1A = 901 - 1050Q 1B = 1051 - 1200Q
GEOM 180m/8w	<i>Mathematics</i> 2 - 2532 GEOM	Algebra 1 credit AND Exact Path Quantile Score: 1201+Q
ALG II 180m/8w	<i>Mathematics</i> 2 - 2522 ALG II	Algebra 1 credit AND Exact Path Quantile Score: 1201+Q

ENGLISH

The Excel Center’s English courses combine English and writing standards and skills beginning with elementary-level skills vertically articulated through college-level standards. The English Language Arts standards require students to utilize higher-order thinking skills and require high school graduates to be college and career-ready. Indiana Academic Standards are internationally benchmarked and were designed through backward mapping from 21st-century college and career readiness benchmarks, creating a seamless vertical articulation of content and skill requirements. Additionally, these ELA courses each incorporate social-emotional learning standards, employability skills, and justice standards that incorporate diversity, equity, and inclusion.

COURSE TITLE Standard Course Length	<i>Credit Type</i> Quantity - # DOE CODE	Prerequisites/Notes
ENG IMMER 1 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 0500 BAS SKLS: ENG IMMER/4w	
ENG IMMER 2 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 0500 BAS SKLS: ENG IMMER/4w	
ENG FOUND 1 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 1120 DEV READNG ₁ 1 - 0500 BAS SKLS: ENG FOUND 1	Lexile Score: 201 - 770L
ENG FOUND 2 90m/8w (or 90m/4w a&b)	<i>General Electives</i> 1 - 1120 DEV READNG ₁ 1 - 0500 BAS SKLS: ENG FOUND 2	Lexile Score: 771 - 985L
English/Language Arts I ENG/LA I 90m/8w	<i>English</i> 1 - 1062 GRAMMAR 1 - 1054 CONTEM LIT	Lexile Score: 986 - 1085L
English/Language Arts II ENG/LA II 90m/8w	<i>English</i> 1 - 1092 CREAT WRIT 1 - 1050 20TH-C LIT	Lexile Score: 1086 - 1130L
English/Language Arts III ENG/LA III 90m/8w	<i>English</i> 1 - 1090 COMP 1 - 1052 WORLD LIT	Lexile Score: 1131+L OR Required: ELA I or II credit
English/Language Arts IV ENG/LA IV 90m/8w	<i>English</i> 1 - 1094 EXPOS WRIT 1 - 1032 ETHNIC LIT General Elective 1 - 1516 ETH STUDIES	Lexile Score: 1131+L

SOCIAL STUDIES

The Social Studies courses for Grades 9-12 are well-articulated, increasing in rigor and expectations without repetition of content. The selection of the standards included in the courses fits with the goal of The Excel Center to prepare students for postsecondary education and career pathways. Additionally, these Social Studies courses each incorporate social-emotional learning standards, employability skills, and justice standards that incorporate diversity, equity, and inclusion.

COURSE TITLE Standard Course Length	<i>Credit Type</i> Quantity - # DOE CODE	Prerequisites / Notes	
Indiana Studies IN STUDIES 90m/4w (or 180m/2w)	<i>General Electives</i> 1 - 1518 IN STUDIES 1 - 1536 ST/LOC GOVT		
Financial Foundations FIN FOND 90m/8w (or 180m/4w)	<i>Social Studies</i> 1 - 1514 ECON <i>Direct Electives</i> 1 - 4540 PRSFINRSP 2 - 4512 BUS MATH	Required: Pre-Algebra credit (prior to course enrollment)	
Geography History of the Worlds GEOG/HST WLD 90m/8w (or 90m/4w a&b)	<i>Social Studies Elective</i> 2 - 1570 GEOG/HST WLD	Required: Eng Found 2 credit OR Lexile Score: 986+L	
GOVT 90m/8w	<i>Social Studies</i> 1 - 1540 US GOVT <i>General Elective</i> 1 - 1512 CPIE	Required: ELA I or II credit OR Lexile Score: 1130+L	Dual Credit Alternative for GOVT See POLS 101 (8w)
US HIST 90m/8w (or 90m/4w a&b)	<i>Social Studies</i> 2 - 1542 US HIST	Required: ELA I or II credit OR Lexile Score: 1130+L	Dual Credit Alternative for 1542aUHST See HIST 101 (8w)

HEALTH & SCIENCE

The Excel Center science courses are aligned to Indiana Academic Standards for science and include social-emotional learning standards, employability skills, and justice skills, including diversity, equity, and inclusion. These courses combine an approach to learning by combining discovery, analysis, laboratory experience, and practical application. Students move through contextual scientific inquiry in the fields of earth and space, biology, chemistry, and physics.

COURSE TITLE Standard Course Length	<i>Credit Type</i> Quantity - # DOE CODE	Prerequisites
Health & Wellness Seminar HLTH & WELL SEM 90m/8w	<i>Health</i> 1 - 3506 HLTH & WELL <i>Physical Education</i> 1 - 3542 PHYS ED I 1 - 3544 PHYS ED II <i>Direct Elective</i> 1 - 5366 HUMAN DEV	NONE
Earth & Space Science EAS 90m/8w (or 90m/4w a&b)	<i>Science Electives</i> 2 - 3044 EAS	Required: Eng Found 2 credit OR Lexile 900+
BIO 90m/8w (or 90m/4w a&b)	<i>Life Science</i> 2 - 3024 BIO I	Required: Eng Found 2 credit OR Lexile 900+
Integrated Chemistry -Physics ICP 90m/8w (or 90m/4w a&b)	<i>Physical Science</i> 2 - 3108 ICP	Required: Alg 1 credit OR Quantile 1100+ AND ELA II credit OR Lexile 1000+

OTHER

COURSE TITLE Standard Course Length	<i>Synergy</i> Course ID for Scheduling	<i>Credit Type</i> Quantity - # DOE CODE	Prerequisites
ADULTROLES 90m/4w (or 180m/2w)	*ARLS	<i>Direct Electives</i> 1 - 5330 ADULTROLES	NONE
Social Emotional Learning SEL 90m/4w (or 180m/2w)	*SEL	<i>Direct Elective</i> 1 - 5366 HUMAN DEV <i>General Electives</i> 1 - 3508 CHI	NONE
Study Skills BAS SKLS: STUDY <i>Varies by school</i>	*STUDY	<i>General Electives</i> 2 - 0500 BAS SKLS: STUDY	NONE
PREP CC 90m/4w (or 180m/2w)	*PREP	<i>Direct Elective</i> 1 - 5394 PREP CC	NONE
Senior Seminar SEN SEM 90m/8w	*SNSEM Or *SNSEM106	<i>Direct Elective*</i> 1 - 5394 PREP CC 1 - 0522 CARR INFO/IVYT 106 <small>* CARR INFO earned prior to 2016-17 is a general elective. IVYT 106 does not count for dual credit pathway.</small>	Within the final two terms before graduation

Attachment 4: Calendar & Schedule

Daily Schedule

Due to the differing needs of students every term when it comes to what credits need to be earned, the courses offered every 8 weeks will vary, therefore examples of classes have been entered to reflect a sample student's schedule. Teacher-specific components of the schedule have also been included.

Monday	Tuesday	Wednesday	Thursday	Friday	
Teacher Prep: 8:30-9:00 am	Teacher Prep: 8:30-9:00 am	Teacher Prep: 8:30-9:00 am	Teacher Prep: 8:30-9:00 am	Staff Data meeting: 8:30- 9:30 am	
Period 1: 9:00 am- 10:30 am EX: English Immersion 2	Period 1: 9:00 am- 10:30 am EX: English Immersion 2	Period 1: 9:00 am- 10:30 am EX: English Immersion 2	Period 1: 9:00 am- 10:30 am EX: English Immersion 2	<i>Students will engage in self- directed learning by either meeting with teachers 1- on-1 or engaging in small group tutoring, etc.</i>	
Passing Period: 10:30-10:35	Passing Period: 10:30-10:35	Passing Period: 10:30-10:35	Passing Period: 10:30-10:35		
Period 2: 10:35-12:05 EX: Indiana Studies	Period 2: 10:35-12:05 EX: Indiana Studies	Period 2: 10:35-12:05 EX: Indiana Studies	Period 2: 10:35-12:05 EX: Indiana Studies		
Lunch: 12:05-12:35 pm	Lunch: 12:05-12:35 pm	Lunch: 12:05-12:35 pm	Lunch: 12:05-12:35 pm		
Period 3: 12:35-2:05 EX: Pre-Algebra	Period 3: 12:35-2:05 EX: Pre-Algebra	Period 3: 12:35-2:05 EX: Pre-Algebra	Period 3: 12:35-2:05 EX: Pre-Algebra		
Passing Period: 2:05-2:10 pm	Passing Period: 2:05-2:10 pm	Passing Period: 2:05-2:10 pm	Passing Period: 2:05-2:10 pm		
Period 4: 2:10-3:40 EX: Earth Space Science	Period 4: 2:10-3:40 EX: Earth Space Science	Period 4: 2:10-3:40 EX: Earth Space Science	Period 4: 2:10-3:40 EX: Earth Space Science		
Teacher Prep & Staff Meeting: 3:40-4:30 pm	Teacher Prep & Staff Meeting: 3:40-4:30 pm	Teacher Prep & Staff Meeting: 3:40-4:30 pm	Teacher Prep & Staff Meeting: 3:40-4:30 pm		

2024-2025 The Excel Center Calendar

August 2024						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September 2024						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 2024						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 2024						
Su	M	Tu	W	Th	F	Sa
					1	2

August

1 1st day of term

September

2 Labor Day
 25 Last day of term
 26-27 Staff Professional Development Day
 30 Staff Professional Development Day

October

1-2 Staff Professional Development Day
 3 1st day of term
 11-14 Fall Break

November

11 Veteran's Day
 26 Last day of term

February 2025

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March 2025

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April 2025

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May 2025

Su	M	Tu	W	Th	F	Sa
				1	2	3

February

17 President's Day
 24 Last day of term

March

31 Spring Break

April

1-4 Spring Break
 21-25 Staff Professional Development Day

May

2 Last day of term
 5 First day of term

3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

27-29 Thanksgiving Break

4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

26 Memorial Day

December 2024						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

December

2-6 Staff Professional Development Day

9 1st day of term

23-31 Winter Break

June 2025						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

June

19 Juneteenth

27 Last day of term

January 2025						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

January

1-3 Winter Break

20 MLK Day

July 2025						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

July

1-3 Staff Professional Development Day

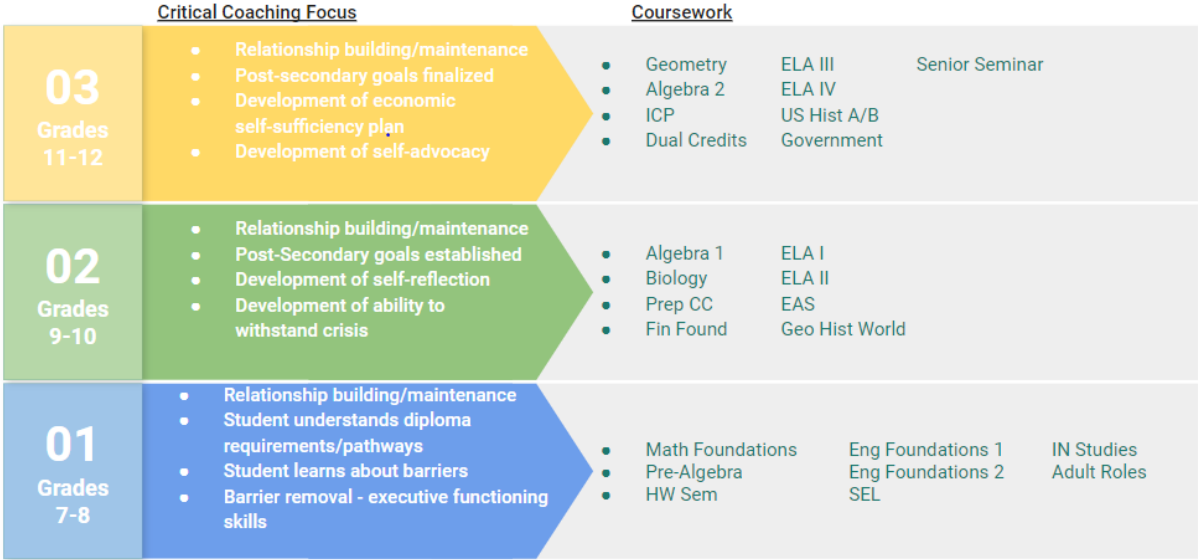
4 Fourth of July

7-25 Summer Break

28-31 Staff Professional Development Day

Attachment 5: Academic and Exit Standards

The chart below outlines which classes in The Excel Center sequence are mapped to which grade levels. In addition, it outlines what factors life coaches are focusing on with students so they are ready to move through the school’s progression.



Academic and Exit Standards for core classes are below

SOCIAL STUDIES ADACEMIC & EXIT STANDARDS

TIER LEVEL	CLASS	CORE COMPETENCY
1	Indiana Studies	<ul style="list-style-type: none"> Explaining who settled Indiana Discuss what steps and individuals made Indiana a state. What was the relationship like between American Indians and European settlers? Explain the 1816 Constitution Compare and Contrast to 1851 Constitution What industries developed a sustainable economy for Indiana? What transportation methods were key to this success?

		<ul style="list-style-type: none"> ● Explaining what individuals from varying backgrounds and what industries shaped the culture of Indiana ● Migration patterns ● Events that shaped Indiana ● Demonstrate content knowledge and exploration of history. <ul style="list-style-type: none"> ○ Research Information ○ Present Information in various medias
2	Geography History of the World	<ul style="list-style-type: none"> ● Understanding the relationship of geography and development of civilizations. ● Examine how development of government, philosophical and theological ideologies influenced the development of the modern world. ● Debate the impact of the industrial revolution on imperialism and the modern world. ● Debate the impact humans have had on the planet and what can be done in the future to preserve the plant.
3	US History A	<ul style="list-style-type: none"> ● Understand the role of US citizens domestically and internationally from the late nineteenth century into the mid-twentieth. ● Understand the role of US citizens domestically and internationally from the late nineteenth century into the mid-twentieth.
	US History B	<ul style="list-style-type: none"> ● Understand the role of US citizens domestically and internationally from the mid-twentieth century into the twenty-first century. ● Understand the role of US citizens domestically and internationally from the mid-twentieth century into the twenty-first century.
	Government	<ul style="list-style-type: none"> ● Understand how the Enlightenment ideas helped influence the expansion of a republican government to the enormous power it has today. ● Explain how constitutional government in the United States has been influenced by centuries of political ideas and traditions from England and elsewhere. ● Evaluate the defining characteristics and features of the US government using documents and concepts from the US founding era. ● Explain how purposes, principles and institutions of government for the American people are established in the United States Constitution

		<ul style="list-style-type: none">● Explain the basic structure of the Constitution and the US government, and explain how the system of checks and balances in the Constitution prevents any one branch of the federal government from becoming too powerful.● Examine the roles and responsibilities of citizens and institutions in the US political process and through local community efforts.
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SCIENCE ACADEMIC & EXIT STANDARDS

**ENGLISH
ACADEMIC & EXIT
STANDARDS**

TIER LEVEL	CLASS	CORE COMPETENCY
Tier 1	Earth & Space A (Earth)	Construct a diagram and explanation showing the convection of Earth's mantle and its impact on the movements of tectonic plates. Explain how tectonic motion creates earthquakes, volcanoes, and tsunamis. Create an action plan for earthquake safety. Explain the process of chemical and physical weathering. Demonstrate the rock cycle process in formation, breakdown, and reformation. Create a geological time scale. Create a presentation over water cycle. Create a model to demonstrate how the Coriolis Effect occurs and the El Nino and La Nina events. Explain the origin, cycle, and behavior of weather systems
	Earth & Space B (Space)	Explain the Biogeochemical Cycles of carbon, nitrogen, oxygen & phosphorus. Analyze/evaluate how humans impact on the environment. Formation of solar system, Describe the characteristics of the various kinds of objects in the solar system, How is space studied-history and instruments/technology? Formation of elements, stars? Explain the lifecycle of stars incorporating differences between high and low mass stars. Important theories and evidence as it relates to the Big Bang?
Tier 2	Biology A	Core Competencies: Design and Experiment using the Scientific Method, Describe the correlation between structure and function (cells and molecules), Be able to discuss the importance/benefit of compartmentalization in cellular structure and function, Create a cyclic model of carbon as it moves from plants through animals.
	Biology B	Core Competencies: Explain how DNA determines structure and function of proteins, Explain the model of DNA as it applies to Mitosis and Meiosis, Investigate inheritance patterns of traits in organisms, Investigate the significance of interdependence among species, Defend the concept of Common Descent with Modification by way of Natural Selection.
Tier 3	ICP A (Physics)	Core Competencies: Interpret motion graphs, Calculate the acceleration of an object, Create free body diagrams in order to interpret the forces acting on an object as it relates to motion, Utilize the law of conservation of energy to explain all forms of energy transfer within a system
	ICP B (Chemistry)	Correlate particle motion, temperature, and states of matter, Interpret patterns and information on the periodic table, Differentiate between ionic and covalent bonding, Balance equations in order to meet the law of conservation of matter, Evaluate the relationship between voltage, current and resistance in a electrical system, Distinguish between fusion and fission reactions, Label the parts of a wave (suggested/time dependent)

Tier Level	Class	Core Competency
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Tier 1	Eng Foundations 1	<ul style="list-style-type: none"> ● Write: complete, grammatically correct sentence, paragraph that includes, topic sentence, details sentences, and conclusions. ● Read: analyze and synthesize a text of 6th grade level (within this broad component will be many skills) ● Speak: deliver a presentation or short speech around a brief topic such as main idea or a summary of a text ● Listen: listen for key elements and show evidence in writing/note taking ● Write: paragraph that includes, topic sentence, details sentences, and conclusions. ● Read: analyze and synthesize a text of 7th grade level (within this broad component will be many skills)
	Eng Foundations 2	<ul style="list-style-type: none"> ● Write: a paragraph that includes topic sentence, details, and conclusion ● Read: analyze and synthesize a text of 8th grade level (within this broad component will be many skills) ● Speaking and Listening: Engage in class discussion and pose questions. ● Write: Use a variety of sentence types to communicate ideas that are organized and supported by detail ● Speak--- deliver a presentation or short speech around a brief topic such as main idea or a summary of a text ● Listen: listen for key elements and show evidence in writing/note taking ● Write: three paragraph essay (intro transitions body conclusion).
Tier 2	ELA I	<ul style="list-style-type: none"> ● Writing: <i>Compose</i> a short narrative that demonstrates understanding of capitalization, punctuation, and spelling, <i>Compose</i> an informative 3-paragraph essay, including an introduction, body, and conclusion, that is free of grammatical/mechanical errors and demonstrates an ability to logically organize ideas and sentences to inform the reader, <i>Collaborate</i> with other students to create a multimodal project that includes a written component, <i>Write</i> a 5-paragraph essay, including an introduction, body, and conclusion, that is free of grammatical/mechanical errors and demonstrates an ability to logically organize ideas and sentences to support an argument. ● Reading: <i>Analyze</i> the implicit and explicit meaning of at least one text. <i>Interpret</i> a number of texts from a variety of genres, including fiction, nonfiction, and poetry.

		<p><i>Synthesize</i> a number of texts from a variety of genres that represent the significant trends in contemporary literature.</p> <ul style="list-style-type: none"> ● Speaking: <i>Share</i> opinions on various topics during class discussions. <i>Deliver</i> a presentation in which ideas are clearly expressed through speaking. ● Listening: <i>Participate</i> in class and group discussions to demonstrate understanding of course content. <i>Participate</i> in class and group discussions to demonstrate understanding of course content. ● Media Literacy: <i>Practice</i> determining the credibility of new information. <i>Demonstrate</i> proficiency in determining the credibility of sources found online.
	ELA II	<ul style="list-style-type: none"> ● Writing: Diagnostic Paragraph, Short Story Creation, Using RACE Strategy to Create Complete Constructive Response Answers, “Write” Instead of “Writer’s Block”, Poetry Writing Focusing on Identity, Poetry Writing - Persona Poems, Short Story Writing Based on Extreme Setting or Tension-Filled Situation, Practice Annotating Texts ● Reading: Prediction, Vocabulary Building, Summarizing, Understanding Context, Support Opinions, Exploring Allusions, Recognizing Literary Irony, Reading Non-Fiction Texts Related to Short Stories, Looking for Imagery, Tone, Extended Definitions, Comparing How One Word Can Change Interpretation, Allusions ● Literary Analysis: Analyze writer’s intention, Analysis of Subtext, Symbolism, Images, Analysis of Punctuation and Writing Conventions, Understanding Context, Evaluate the Quality of a Poem, Understanding Poetry as a Picture and Story Rather Than to Be Understood, Pass judgment on the quality of a work, Analyzing character motivation, Analysis of Punctuation and Writing Conventions, Understanding How Setting and Context Heightens Drama, Recognition of What Goes Unsaid or Unspoken, Limitation of Words to Say What We Mean, Predicting Life After the Story Ends, Asking Why a Story Lasts, Comparing Differences in Opinions About Literature, Comparing Differences in Literary Analysis Over Time, Purpose and Intended Result vs. What Happens, Ethical Behavior, Prediction, Comparing Differences in How Non-Fiction Texts Change Over Time ● Creative Writing Skill Building: Noticing Exercise, Deeper-Level Thinking, Analysis of the Writer’s Process, Draft and Revision, Use of Poetic Forms, Drawing Inspiration, Building Empathy, Using Writing to Understand Emotions,

		<p>Using setting or situation as a character in a short story, Drawing Inspiration from Real Life Experiences. Story Beginnings “In Medias Res,” Where to end a story, Using Writing to Be Persuasive, Imagining Alternative Futures, Problem Solving</p> <ul style="list-style-type: none"> ● Research for Creative Writing: Research to create a believable fictional world.
Tier 3	ELA IV	<ul style="list-style-type: none"> ● Read and interact with a variety of grade-appropriate ethnic literature independently and proficiently ● Actively engage in listening and exchanging ideas in a reflective manner ● Deliver a multimedia presentation or speech to discuss, debate, and collaborate relating to appropriate topics ● Write an evidence-based research paper 5-7 pages in length -
	ELA III	<ul style="list-style-type: none"> ● Understand the cultural connection to the purpose of a folktale or legend ● Read: independently analyze and synthesize fiction ● Speak: deliver a speech relating to appropriate topics ● Listen: engage in and exchange ideas in a reflective manner ● Write: appropriate responses in a reflective, explanative manner ● Make the connection between life explained in poetry and life influenced in drama ● Read: independently analyze and synthesize fiction ● Speak: deliver a rendition of a poem ● Listen: engage in and exchange ideas in a reflective manner ● Write: a short poem in a similar style as one analyzed ● Read: independently analyze and synthesize fiction and nonfiction world texts ● Speak: discuss, debate, and collaborate ● Listen: engage in and exchange ideas in a reflective manner ● Write: a short comparison piece between a fictional and nonfictional text on the same topic ● Read: independently analyze and synthesize fiction and nonfiction world texts ● Speak: deliver a multimedia presentation ● Listen: engage in and exchange ideas in a reflective manner ● Write: a 5-7 page research paper that synthesizes information from multiple texts

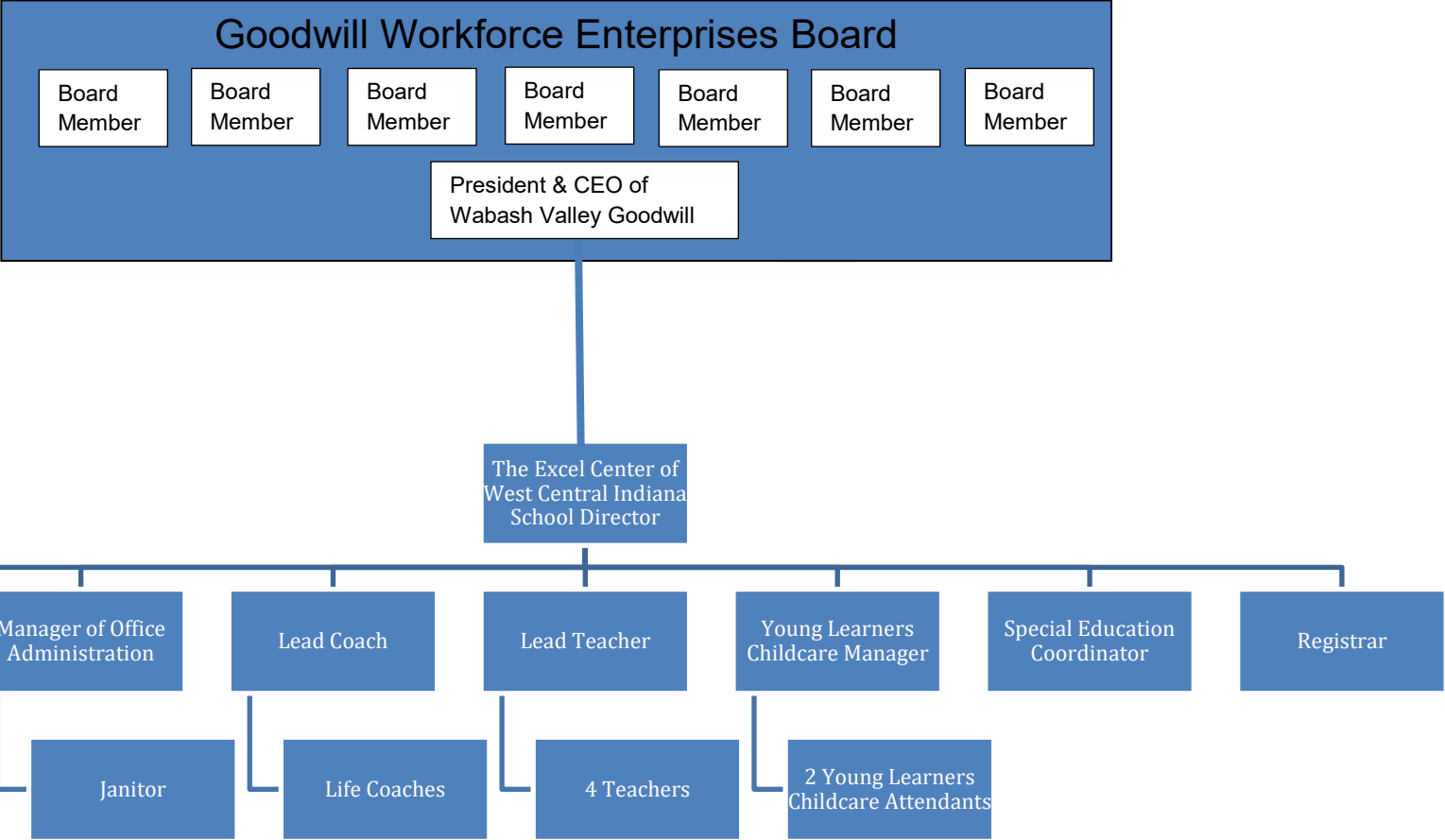
TIER LEVEL	CLASS	CORE COMPETENCY
Tier 1	Pre-Algebra	<ul style="list-style-type: none"> ● Solve multi-step equations (up to variable on both sides) ● Perform operations with polynomials ● Solve literal equations ● Solve and graph inequalities ● Properties of exponents ● Represent real-world problems (in several topics)
	Math Foundations	<ul style="list-style-type: none"> ● Perform operations with integers ● Evaluate expressions using order of operations, distribution, and combining like terms ● Plot ordered pairs ● Graph a linear equations using a table ● Simplify fractions ● Find the GCF, LCM ● Number sense (Arithmetic Review)
Tier 2	Algebra 1	<ul style="list-style-type: none"> ● Solve quadratic equations ● Factor quadratic expressions ● Graph a quadratic equations ● Solve and graph systems of linear equations ● Simplify square roots (including non-perfect squares) ● SYSTEMS OF EQUATIONS ● Domain, range, and functions ● Writing equations of lines ● Graph linear equations ● Data and statistics ● Represent real-world problems (in several topics)
Tier 3	Algebra 2	<ul style="list-style-type: none"> ● Represent real world problems that can be modeled with quadratic functions using tables, graphs, and equations; translate fluently among these presentations. Solve such problems with and without technology. Interpret the solutions and determine whether they are reasonable. ● Understand that different forms of a quadratic equation can provide different information. Use and translate quadratic functions between standard, vertex and intercept form to graph and identify key features, including intercepts, vertex, line of symmetry, end behavior and domain and range.

		<ul style="list-style-type: none"> ● Use the discriminant to determine the number and type of solutions of a quadratic equation. Find all solutions and write the complex solutions in the form of $a \pm bi$ for real numbers a and b. ● Understand dependent and independent events, and conditional probability; apply these concepts to calculate probabilities. ● Understand the Fundamental Counting Principle, permutations, combinations; apply these concepts to calculate probabilities. ● Solve a system of equations consisting of a linear equation and a quadratic equation in two variables algebraically and graphically without technology. ● Graph exponential and logarithmic functions with and without technology. Identify and describe key features, such as intercepts, domain and range, asymptotes and end behavior. Know that the inverse of an exponential function is a log function. ● Identify the percent rate of change in exponential functions. Classify them as exponential growth or decay. ● Use the properties of exponents to derive properties of logarithms. Evaluate exponential and logarithmic expressions. ● Solve exponential and logarithmic equations in one variable ● Graph mathematical functions including: Rational functions, with technology. Identify and describe features, such as intercepts, domain and range, end behavior, and line of symmetry. ● Use properties of exponents to rewrite expressions to describe transformations of exponential functions
	Geometry	<ul style="list-style-type: none"> ● Define angle, circle, perpendicular lines, parallel lines, Line segments, theorems, and postulate/axiom ● Recognize vertical angles as congruent. ● Identify congruent and supplementary pairs of angles formed by a transversal passing through two parallel lines. ● Recognize that a perpendicular bisector of a line segment cuts the line in half. ● Determine if a pair of lines are parallel, perpendicular, or neither by comparing their slopes. ● Use properties of angle bisectors to construct congruent angles. ● Use properties of perpendicular bisectors to construct congruent segments ● Calculate the distance between two points on a line using the distance formula. ● Find the midpoint between two points on a line using the midpoint formula. ● Solve for missing angles of triangles using the sum of the interior angles of a triangle is 180 degrees.

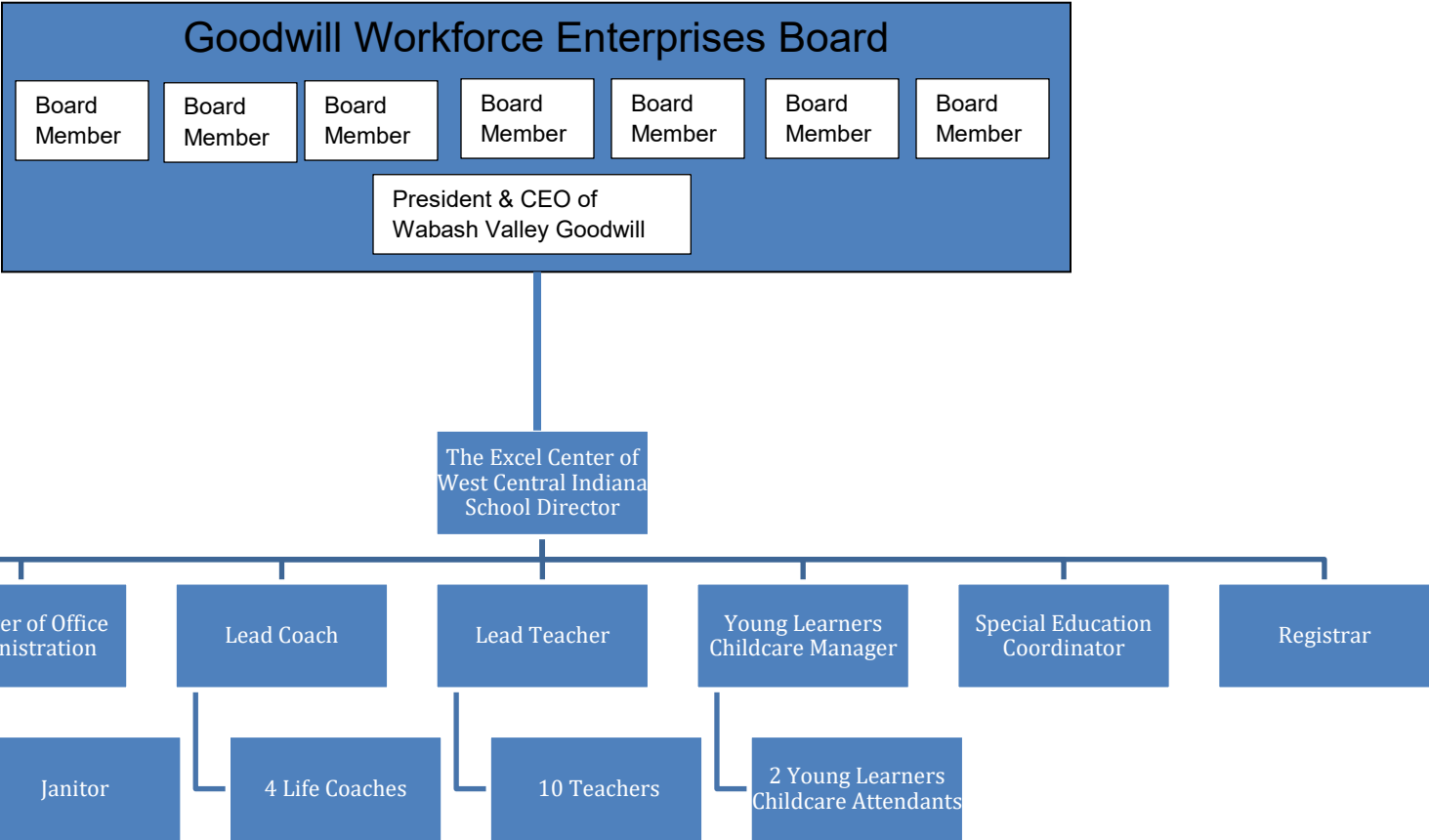
- Solve for missing angles and sides of isosceles triangles using The Isosceles Triangle Theorem.
- Solve for missing side lengths of right triangles using The Pythagorean Theorem.
- Apply the Mid-segment theorem that the segment joining midpoints of two sides of a triangle is parallel to the third side and half the length.
- Apply the theorem that a line parallel to one side of a triangle divides the other two proportionally.
- Utilize the angle bisector theorem to set up proportions to solve for missing sides of triangles.
- Indicate whether triangles are congruent and by which property; ASA, SAS, AAS, SSS, or HL.
- Explain and justify the process to form congruent triangles.
- Indicate whether triangles are similar and by which property; AA, ASA, or SSS.
- Use congruent and similar triangles to solve real world problems including perimeter and area.
- Utilize the triangle inequality theorem.
- Utilize the hinge theorem and its converse.
- Utilize the geometric mean theorem to solve for missing parts of triangles.
- Set up proportions for the sine, cosine, and tangent of angles. G.T.8
- Use trigonometric ratios (sine, cosine, tangent, and their inverses) and the Pythagorean Theorem to solve real-world and mathematical problems.
- Apply properties of special right triangles to solve for missing side lengths in the real world and other mathematical problems.
- Understand the properties of parallelograms, including angles, diagonals, and sides.
- Classify parallelograms as rhombuses, rectangles, squares, kites, and trapezoids.
- Solve for the measures of interior and exterior angles of polygons.
- Determine if polygons have line, point, and/or rotational symmetry.
- Configure the perimeter and area of polygons to solve real-world and other mathematical problems.
- Calculate the area of regular polygons.
- Prove that given quadrilaterals are parallelograms, rhombuses, rectangles, squares or trapezoids.

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| | | <ul style="list-style-type: none"> ● Define radius, diameter, arc, measure of an arc, chord, secant, tangent, congruent circles, and concentric circles. ● Configure the arc length of a segment of a circle. ● Calculate the area of a sector of a circle. ● Solve for central, inscribed, and circumscribed angles. ● Recognize that an inscribed angle on a diameter is a right angle. ● Recognize that a radius is perpendicular to a tangent where the radius intersects the circle. ● Solve real-world and other mathematical problems involving finding circumference, area of circles and sectors, arc lengths, and related angles (central, inscribed, segment lengths formed by secant/tangent) ● Construct a circle that passes through three given points not on a line, a tangent line to a circle through a point on the circle, and a tangent line from a point outside a given circle to the circle. ● Configure the measurement of angles of a quadrilateral inscribed in a circle. ● Transform geometric figures on a coordinate plane using translations, reflections, and rotations. ● Dilate figures on a coordinate plane using a scale factor. ● Describe relationships between the faces, edges, and vertices of three-dimensional solids. Create a net for a given three-dimensional solid. Describe the three-dimensional solid that can be made from a given net (or pattern). ● Identify the shapes of two-dimensional cross-sections of three-dimensional objects, and identify three-dimensional objects generated by rotations of two-dimensional objects. ● Know properties of congruent and similar solids, including prisms, regular pyramids, cylinders, cones, and spheres; solve problems involving congruent and similar solids. ● Solve real-world and other mathematical problems involving volume and surface area of prisms, cylinders, cones, spheres, and pyramids, including problems that involve algebraic expressions. ● Apply geometric methods to solve design problems (e.g., designing an object or structure to satisfy physical constraints or minimize cost; working with typographic grid systems based on ratios). |
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Attachment 6: Organizational Chart
YEAR1



Attachment 6: Organizational Chart



Attachment 7: The Excel Center Student Discipline Policy

This is the draft student discipline policy that will be approved by the board prior to school opening. The Excel Center of West Central Indiana will implement Progressive Discipline Steps outlined below.

Building Personal Responsibility: The purpose of disciplinary action at The Excel Center Wabash Valley will be to ensure that both individual students and the school community stay focused on growth and learning. Depending on the nature of the infraction and the student's past performance, any or all of the following consequences may be appropriate:

- *Student warning, oral or written:* Immediate resolution of the problem or issue is expected.
- *Meeting with coach and or school director:* Students may be required to meet with their coach and/or the school director to discuss the situation and diffuse tensions that may have arisen.
- *Participation in Instructional Program:* A student may be expected to attend a course such as anger management, conflict resolution, peer mediation, or stress reduction; participate in group or individual counseling, or attend other programs intended to redirect the student's perceptions and behavior.
- *Remuneration:* A student may be expected to perform service to correct or repair any damages or harm that may have resulted from the student's behavior.
- *Suspensions:* Threats, bullying, and intimidation will not be tolerated at school or in connection with students, families, and staff of The Excel Center Wabash Valley. Students will be subject to suspension and/or expulsion for verified acts that threaten, bully, or intimidate others. Fighting will not be tolerated at school. A student who physically strikes another individual will be subject to suspension and/or expulsion.
- *Expulsion:* After a proper investigation and hearing, students may be expelled when their behavior renders it appropriate. Repeated offenses may lead to expulsion.

If the school director or designee makes a recommendation for the expulsion of students, the school director or designee will be able to suspend the students until the conclusion of expulsion proceedings. This may occur if the school director believes that the students must be suspended immediately to prevent or substantially reduce the risk of

- Interference with an educational function or school purpose or,
- A physical injury to themselves, other students, school employees, or visitors of the school.

Expulsion is mandatory for:

- Bringing, using, or possessing a weapon at school. Recommendation for expulsion from school for a period of not less than one year shall be mandated for a student who is determined to have brought a firearm to school.

Expulsion is recommended for:

- Theft or robbery as defined in Indiana code.
- Commission of an act, which, if committed by an adult, would be first- or second-degree assault as defined in Indiana code.
- The possession of a drug or a controlled substance as defined in Indiana code.
- Threats, bullying, harassment, and intimidation at school or in connection with students, families, and staff of The Excel Center Wabash Valley. Students will be subject to expulsion for verified acts that threaten, bully, harass, or intimidate others.
- Fighting. A student who physically strikes another individual may be subject to expulsion.

Celebrating Positive Behavior

The school will celebrate students who display positive behavior through visuals on the walls with the character traits the student displayed or the school may offer end-of-term celebrations for student who display positive behavior.

IDEA Compliance

For students receiving special education services under IDEA, all disciplinary actions will be in

accordance with relevant laws and regulations. School personnel will not remove students with disabilities from their current placements for more than 10 consecutive school days. Students with disabilities will follow the same disciplinary procedures as students without disabilities if during a manifestation review (to be completed by the student's case conference committee with support from the School Director and school board as needed) the behavior in question is not determined to be a manifestation of the student's disability, the appropriate services are provided during a period of removal and the student is provided with a notification. Notification will include the opportunity for the student to complete coursework at no cost to the student.

Manifestation Reviews will be completed by the school director, Special Education Coordinator, student, and anyone else from the student's case conference committee. The group will examine the incident to determine if it was a result of the student's disability and then make recommendations as to the discipline of the student. If the student's behavior results in suspension, the student will still be provided access to their services, in accordance with the law.

Appeal Rights

The governing board of the school plans to vote to not review appeals under Indiana Code 20-33-8-19. The student or the student's guardian may appeal the expulsion determination to the circuit or superior court.

Attachment 8 – Evidence of Community Engagement

Included in this section is a narrative on The Excel Center of West Central Indiana’s community engagement as well as letters of support from the following individuals/organizations:

- **Kristin Craig – Chamber of Commerce**
- **Duke Bennett – Mayor of Terre Haute**
- **Chris Switzer – Vigo County Commissioner**
- **Darin May – Wabash Valley Goodwill**
- **Casey Schroepel – Elanco**
- **Norman Lowery – First Financial Bank**
- **David Templeton – Glas-Col/Templeton Coal**
- **Rene Hankins – Wabash Valley Goodwill Board of Directors**
- **John Collett – Garmong Construction**
- **Lisa Walker – Wabash Valley Goodwill**
- **Mary Halstead – Wabash Valley Goodwill Board of Directors**
- **John Major – MSI Construction**
- **Stacia Phillips – Wabash Valley Goodwill Board of Directors**
- **Roberto Bohrer – Steel Dynamics**
- **Sara Dinkel Smith – Sycamore Engineering**
- **Timothy Fears – Thompson Thrift**
- **Brian Dyer – The Hometown Savings Bank**
- **Ivan Morris – Vigo County Commissioner**
- **Mark Clinkenbeard - Vigo County Commissioner**
- **Dan Davis – Wabash Valley Goodwill**
- **Ashley Stanisz – Wabash Valley Goodwill**

There has been much community engagement for The Excel Center of West Central Indiana. Meredith Osburn, President and CEO of Wabash Valley Goodwill has spearheaded much of this engagement. She has done this through multiple avenues. She has hosted lunch and learn sessions to educate the community on The Excel Center, has given multiple presentations on The Excel Center, and been a constant voice for bringing an Excel Center to West Central Indiana. Below is a table showing those that attended the first Lunch and Learn on April 25, 2022.

Attendee	Organization
Betsy Delgado	Goodwill Education Initiative
Senator Jon Ford	Indiana State Senator
Duke Bennett	Mayor of Terre Haute
Chris Egge	RJL Solutions
John Collett	Garmong Construction
Kristin Craig	Terre Haute Chamber of Commerce
Santhana Naidu	Wabash Valley Goodwill Board of Directors
Rene Hankins	Wabash Valley Goodwill Board of Directors
Dan Davis	Wabash Valley Goodwill
Lisa Walker	Wabash Valley Goodwill
Darin May	Wabash Valley Goodwill
Ashley Stanisz	Wabash Valley Goodwill

There was another lunch and learn on June 8th, 2022. It was attended by the following individuals.

Attendee	Organization
Kent Kramer	Excel Center Representative
Santhana Naidu	Wabash Valley Goodwill Board of Directors

Dr. Jan Hamening	Wabash Valley Goodwill Board of Directors
Dr. Will Shriner	Wabash Valley Goodwill Board of Directors
Stacia Phillips	Wabash Valley Goodwill Board of Directors
John Lukens	Wabash Valley Goodwill Board of Directors
Mary Halstead	Wabash Valley Goodwill Board of Directors
Ashley Stanisz	Wabash Valley Goodwill
Dan Davis	Wabash Valley Goodwill
Lisa Walker	Wabash Valley Goodwill
Darin May	Wabash Valley Goodwill

There was a final lunch and learn on January 19, 2023 and was attended by the following individuals.

Attendee	Organization
Sarah Thomas	Goodwill Education Initiatives
Lisa Walker	Wabash Valley Goodwill
Dan Davis	Wabash Valley Goodwill
Darin May	Wabash Valley Goodwill
Jon Ford	Indiana State Senator
Mike Myers	Congressman Larry Buschon
Kristin Craig	Terre Haute Chamber of Commerce
TJ Collet	RJL Solutions
Chriss Egge	RJL Solutions
Ryan Keller	Thrive West Central
Danielle Isbel	United Way
Leah Allman	Ivy Tech
Mary Halstead	Wabash Valley Goodwill Board of Directors
Pat Goodwin	12 Points Revitalization Initiative
Duke Bennett	Mayor of Terre Haute
Karen Long	12 Points Revitalization Initiative
Lori Danielson	Ivy Tech
Chris Switzer	Vigo County Commissioner

Meredith also attended The Excel Center National Conference where she was able to make connections to other leaders in The Excel Center National Network. She was to gain invaluable knowledge about opening and operating a school and ensuring that it was right for our community. In order to show commitment to opening The Excel Center Goodwill hired a local marketing and public relations firm, RJL Solutions, to help in bringing The Excel Center to West Central Indiana. The Terre Haute Chamber of Commerce voted to advocate for the Excel Center coming to Terre Haute in the 2023 legislative session, utilizing RJL Solutions for state house advocacy.

Below are the lists of the tours that were taken by individuals to show support for The Excel Center by taking the time to learn more about it. These lists include individuals that we will continue to have a relationship with, in order to make The Excel Center successful. Meredith attended all of these meetings in addition to setting them up.

This table shows the individuals that were on the first tour of an Excel Center in August 2021 as well as the organization they associated with.

Attendees	Organization
Senator Jon Ford	Indiana State Senator
Ryan Keller	Thrive West Central
Rep. Tonya Pfaff	Indiana State Representative
Dan Davis	Wabash Valley Goodwill
Deann Goetz	Wabash Valley Goodwill
Kent Kramer	Goodwill Education Initiatives

Betsy Delgado	Goodwill Education Initiatives
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This is the table that lists the individuals that attended a Wabash Valley Goodwill informational meeting on bringing The Excel Center to Terre Haute on September 16, 2022.

Attendees	Organization
Sarah Thomas	Goodwill Education Initiatives
Jaylyn Brown	Goodwill Education Initiatives
Catherine Airhart	Wabash Valley Goodwill
Sherry Buis	Wabash Valley Goodwill
Ashley Stanisz	Wabash Valley Goodwill
Darin May	Wabash Valley Goodwill
Dan Davis	Wabash Valley Goodwill
Bekka Kramer	Wabash Valley Goodwill
Diana Lawrence	Wabash Valley Goodwill

This is the table that shows the attendees for an Excel Center tour that took place on October 13, 2022.

Attendee	Organization
Kristin Craig	Terre Haute Chamber of Commerce
Senator Jon Ford	Indiana State Senator
Jenn Templeton	Glas-Col/Templeton Coal
David Templeton	Glas-Col/Templeton Coal
John Collett	Garmong Construction
Richard Payonk	United Way
Duke Bennett	Mayor of Terre Haute
Santhana Naidu	Wabash Valley Goodwill Board of Directors
Bekka Kramer	Wabash Valley Goodwill
Philip Sicuso	Bose, McKenney, & Evans
Ali Bartlett	Bose, McKenney, & Evans
Kent Kramer	Goodwill Education Initiatives
Jaylyn Brown	Goodwill Education Initiatives
Sarah Thomas	Goodwill Education Initiatives
Michael Myers	Congressman Larry Bucshon

This is the table that shows the attendees for an Excel Center tour that took place on November 17, 2022.

Attendee	Organization
Lori Danielson	Ivy Tech
Santhana Naidu	Wabash Valley Goodwill Board of Directors
Rene Hankins	Wabash Valley Goodwill Board of Directors
Amy Zwerner Gibson	Community Advocate
Mary Halstead	Wabash Valley Goodwill Board of Directors
Josh Alsip	Terre Haute Chamber of Commerce
Bekka Kramer	Wabash Valley Goodwill
Mike Rentfro	Next Steps
Eric Brown	Next Steps

This is the table that shows the attendees for an Excel Center tour that took place on February 1, 2023.

Attendees	Organization
Catherine Airhart	Wabash Valley Goodwill
Dan Davis	Wabash Valley Goodwill
Darin May	Wabash Valley Goodwill

Sherry Buis	Wabash Valley Goodwill
Shauna Thomas	Wabash Valley Goodwill
Mike Myers	Congressman Larry Bucshon
Beth Tevlin	Wabash Valley Community Foundation
TJ Collett	RJL Solutions
Chris Egge	RJL Solutions
Mike Rentfro	Next Steps
Eric Brown	Next Step
Rene Hankins	Wabash Valley Goodwill Board of Directors
Amy Zwerner Gibson	Community Advocate
Leah Allman	Ivy Tech
Mary Halstead	Wabash Valley Goodwill Board of Directors
Pat Goodwin	12 Points Revitalization Initiative
Bill Shriner	Wabash Valley Goodwill Board of Directors

This is the table that shows the attendees for the final Excel Center tour that took place on May 23, 2023.

Attendee	Organization
Darin May	Wabash Valley Goodwill
Lisa Walker	Wabash Valley Goodwill
Carl Conwell	Holy Cross School
John Lukens	Wabash Valley Goodwill Board of Directors
Sarah Thomas	Goodwill Education Initiatives

The above tables show the community involvement and the support that The Excel Center of West Central Indiana will have when it opens. We will continue to foster these relationships and look for creative and meaningful ways to partner with these organizations and individuals. In addition to all of these tours and lunch and learns that Meredith Osburn has organized she also gave presentations or had individuals meetings with the following organizations and individuals:

- Next Steps
- CODA
- Downtown Terre Haute Rotary
- Drug Free Vigo County
- Breakfast Optimist Club
- Terre Haute Chamber of Commerce
- Indiana Agricultural Institute
- United Way of the Wabash Valley- Job Skills Impact Council
- Wabash Valley Community Foundation – Quality of Life Council
- Judge Lucky Reddy
- Kandace Brown, CASY
- Dr. Kelsey Bogard, Indiana State University
- Sonja Jordan, Ivy Tech DEI Director
- Troy Fears, Candles Museum Director
- Steven Preston, President and CEO Goodwill Industries International

Osburn and the Goodwill team have worked with and formed positive working relationships with local and state government officials. These include the Mayor of Terre Haute, Duke Bennett, County Commissioner Chris Switzer, Indiana State Senator, Jon Ford, and Indiana State Representative Tonya Pfaff. These people have taken tours of Excel Centers and voiced support and written letters of support for bringing The Excel Center to West Central Indiana. The following community members have been integral in helping bring The Excel Center to West Central Indiana and make up the inaugural Board of Directors for The Excel Center of West Central Indiana.

Board Member	Community Organization	Role
Kristin Craig	Executive Director, Terre Haute Chamber of Commerce	Board Chair
Betsy Peperak	COO, RJI Solutions	Secretary
Ryan Keller	Executive Director, Thrive West Central	Treasurer
Rene Hankins	Director of Pre-College Outreach, Rose Hulman	Director
Leah Allman	Vice Chancellor for Enrollment Services, Ivy Tech	Director
Mary Halstead	Retired	Director
John Lukens	Retired	Director

The Excel Center of West Central Indiana had a considerable letter writing campaign and several local businesses wrote letters of support for The Excel Center. These letters were sent to state legislators to show the support that the local community has for The Excel Center. Those businesses that wrote letters include:

- Casey Schroepfel, Elanco
- Norman Lowery, First Financial Bank
- David S. Templeton, Glas-Col and Templeton Coal Company
- Marie Shanks, Indiana State Federal Credit Union
- John Collett, Garmong Construction
- John V. Major, MSI Construction
- Roberto Bohrer, Steel Dynamics Heartland
- Sara Dinkel Smith, Sycamore Engineering
- Timothy E. Fears, Thompson Thrift
- Bryan Dyer, Terre Haute Savings Bank
- Ivan M. Morris & Mark Clinkenbeard, Vigo County Commissioners
- Members of the Wabash Valley Goodwill Board of Directors
- Wabash Valley Goodwill Executive team

This lists and tables above show the wide breadth and scope of the businesses and community members that are supporting The Excel Center of West Central Indiana. We will continue to foster these relationships as the school opens and operates. We will invite not just the supporters of The Excel Center but the entire community to tour the school, celebrate the opening of the school, and to celebrate graduations. There will be partnership opportunities with many of these organizations as the school evaluates the needs of not only the students but also of the businesses and organizations in our community. We will strive to engage other organizations moving forward to help the school grow and to help our students become more competitive in the workplace. We will also be constantly reassessing these partnerships to find new and creative ways for local organizations to support The Excel Center of West Central Indiana and its students.

April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204



Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Terre Haute Chamber of Commerce, its Board of Directors and the almost 700 businesses members across West Central Indiana, I write today to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge, and cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond is crucial to ensure the continued success of Terre Haute and Vigo County.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at krcraig@terrehautechamber.com

Sincerely,

A handwritten signature in black ink that reads "Kristin Craig". The signature is written in a cursive, flowing style.

Kristin Craig
Executive Director



BUILDING BUSINESS. BUILDING COMMUNITY.



April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

As Mayor of the City of Terre Haute, I am writing to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

Research shows that almost 20 percent of Terre Haute's population do not hold a high school diploma. The Goodwill Excel Center is a proven model of providing high school diplomas to adult learners and is a crucial element to growing Indiana's workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at Mayor@terrehaute.in.gov

Sincerely,

Duke A. Bennett
Mayor





THE BOARD OF COMMISSIONERS OF VIGO COUNTY

Commissioners

Mark Clinkenbeard, 1st District
Chris Switzer, 2nd District
Mike Morris, 3rd District

650 S. 1st Street
Terre Haute, Indiana 47807
(812) 462-3367

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

We are reaching out on behalf of Vigo County to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

Terre Haute and Vigo County do not currently have an Excel Center, but with our unique position as a hub of higher education, our workforce pipeline would be greatly expanded with its addition. The Excel Center is a proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' accepted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

Research shows that almost 20 percent of Terre Haute's population do not hold a high school diploma. The Goodwill Excel Center is a proven model of providing high school diplomas to adult learners and is a crucial element to growing Indiana's workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact us directly at (812) 462-3367.

Sincerely,



Ivan M. Morris



Chris Switzer



Mark Clinkenbeard

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Murrill, Representative Thompson, and Members of the General Assembly:

On behalf of the Executive Team of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, I request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at dmay@wvgoodwill.org.

Sincerely,



Darin May
Workforce Development and Mission Director

April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Elanco facility located in Vermillion County, Indiana, I am writing to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. West Central Indiana does not currently have an Excel Center and would benefit greatly from its proven model of providing high school diplomas to adult learners.

As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge, and cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond are crucial to ensure the continued success of Terre Haute, Vigo County and West Central Indiana.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at casey.schroepfel@elancoah.com.

Sincerely,



Exec Director – Site Head, Clinton
Animal Health Manufacturing & Quality

Elanco Animal Health
10500 S. St. Rd. 63 Clinton, IN 47842
M 812.229.8015 P 765.832.4011
casey.sciroppel@elancoah.com
www.elanco.com



First Financial Bank

Always Close to Home

NORMAN D. LOWERY
Chief Operating Officer
First Financial Bank, N.A.
P.O. Box 540
Terre Haute, IN 47808-0540
Phone: (812) 238-6185
Fax: (812) 235-0555

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of First Financial Bank, located in Terre Haute, I am requesting the Senate include the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center but could benefit from developing a workforce of educated individuals who hold a high school diploma, workforce certifications.

Securing a reliable workforce in the State of Indiana has been a challenge. While there are many educational paths that people can take, ensuring that West Central Indiana can be served by an Excel Center is a crucial element to growing our workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce, the support of the Indiana General Assembly is crucial. We ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at lowerynd@first-online.com.

Sincerely,

Norman D. Lowery



Glas-Col®

7 HILLYARD STREET
 20 BURGESS
 TERRE HAUTE, INDIANA 47602-0001 USA
 TEL: 812 435 6137 FAX: 812 214 0971
 E-MAIL: www.glascol.com
 E-MAIL: info@glascol.com

April 13, 2023

Indiana General Assembly
 200 West Washington Street
 Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

As a leader in the Terre Haute business community, I am writing on behalf of Glas-Col®, LLC, to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center but would benefit greatly from its proven model of providing high school diplomas to adult learners.

As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge, and cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond is crucial to ensure the continued success of Terre Haute, Vigo County and West Central Indiana.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GWI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at David.Templeton@glascol.com.

Sincerely,

David S. Templeton
 President & CEO

LABORATORY HEATING, MIXING AND SHAKING • INDUSTRIAL HEATING AND HEAT TREATING

April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Board of Directors of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, **we request the Senate reinclude the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.**

Terre Haute does not currently have an Excel Center but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. **We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.**

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at hankins@rose-hulman.edu.

Sincerely,

Rene Hankins

Rene Hankins, Vice Chair
Wabash Valley Goodwill



April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of Garmong Construction, headquartered in Terre Haute, I write today to request that the Senate include the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. As we all know, securing a reliably trained workforce pipeline in the State of Indiana and across our nation is a known challenge. There are many highly successful Excel Centers across our state, however, there are noticeable gaps, one of which is West Central Indiana. We do not currently have an Excel Center but would benefit from its model of proven success in cultivating a workforce of diverse and trained individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

A recent study to determine the need for an Excel Center in Vigo County showed that 10,454 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. Vigo County, as well as West Central Indiana needs to do better, and an Excel Center is an important piece of this puzzle that we are missing.

Our community will embrace and support this effort. Many employers and higher education institutions have already expressed interest in partnering with the Excel Center. As our region's business and educational community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. Again, I am asking you to support our community with this request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at collett@garmong.net or 812-208-3843.

Sincerely,

John A. Collett, P.E.
Garmong Construction Services


3000 Poplar Street
Terre Haute, IN 47802


812.234.3714


garmong.net

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Executive Staff of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

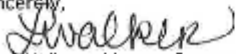
We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GFI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,164 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at lwalker@wvgoodwill.org

Sincerely,



Lisa Walker • Human Resources Director
Wabash Valley Goodwill Industries, Inc.
2702 South 3rd Street • Terre Haute • IN • 47802
Tel: 812-235-1827 • Fax: 812-235-1397
Email: lwalker@wvgoodwill.org

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Board of Directors of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, to request the Senate reestablish the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and look forward to discussing it further at your convenience. Please do not hesitate to contact me at dahalsted@aol.com.

Sincerely,

Mary S. Halsted
Secretary
Wabash Valley Goodwill Board of Directors



April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

I am writing as a leader in the West Central Indiana business community, specifically on behalf of MSI Construction, an employer located in Clinton, Indiana, to request the Senate reinclude the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders to move forward with plans to create a Goodwill Excel Center and serve the needs of adult learners within our community.

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As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at jmajor@msi-construction.com.

Sincerely,

John V. Major
President

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Board of Directors of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, to request the Senate reinclude the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at smaphillips27@yahoo.com.

Sincerely,

Stacia A. Phillips
Wabash Valley Goodwill Board Member

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of Steel Dynamics Heartland, located in Terre Haute, I write today to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to better serve the needs of adult learners within our community.

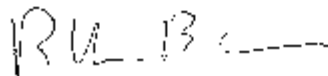
As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge. While there are many educational paths that potential employees and members of the workforce may take, ensuring that our area can be served by an Excel Center is a crucial element to growing our workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at roberta.holzer@steeldynamics.com

Sincerely,



Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

April 14, 2023

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of Sycamore Engineering and Dinkel Associates, located in Terre Haute, I write today to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center, but research shows we need one.

We supported HB1001 to benefit our businesses by training these adults with the skills necessary to contribute to our community. Vigo county does not have a strong workforce and this is evident in the reports produced quarterly by the Indiana Department of Labor through Hoosiers by the Numbers. While there are many educational paths that potential employees and members of the workforce may take, ensuring that our area can be served by an Excel Center is a crucial element to growing our workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

Our community has put in the time and effort to explore these leads and opportunities. If we lose out because of funding, we lose the support and faith in our business leaders who depend on these programs. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I welcome an opportunity to share my concerns if you choose to, I can be reached at sds@syceng.com

Sincerely,

Sara Dinkel Smith
Chief Executive Officer

812.514.7661





April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of Thompson Thrift Development, Inc., located in Terre Haute, I write today to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Hocomb's proposed budget and the House of Representatives' accepted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to better serve the needs of adult learners within our community.

As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge. While there are many educational paths that potential employees and members of the workforce may take, ensuring that our area can be served by an Excel Center is a crucial element to growing our workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

Terre Haute
501 Wabash Avenue
Suite 300
Terre Haute, IN 47807
812-235-5959

Indianapolis
111 Monument Circle
Suite 1500
Indianapolis, IN 46204
800-687-0012

Phoenix
2998 E Camelback Road
Suite 210
Phoenix, AZ 85016
602-310-8831

Houston
17314 SH 243
Suite 320
Houston, TX 77064
281-971-7016



/// ThompsonThrift.com

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at tfears@thompsonthrift.com.

Sincerely,

Timothy E. Fears
Sr. Vice President - Legal



April 14, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of The Hometown Savings Bank located in Terre Haute, I write today to request the Senate reinclude the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001. Terre Haute does not currently have an Excel Center but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001, would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to better serve the needs of adult learners within our community.

As we all know, securing a reliable workforce pipeline in the State of Indiana has been a challenge. While there are many educational paths that potential employees and members of the workforce may take, ensuring that our area can be served by an Excel Center is a crucial element to growing our workforce and filling critical jobs.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at bdyer@thsb.com

Sincerely,



Brian Dyer
Senior Vice President & Trust Officer
Phone: (812) 244-5192
Fax: (812) 244-5156
Email: bdyer@thsb.com
The Hometown Savings Bank
P.O. Box 9629
Terre Haute, IN 47808
www.thsb.com

April 13, 2023

Indiana General Assembly
200 West Washington Street
Indianapolis, Indiana 46204

Dear Senator Mishler, Representative Thompson, and Members of the General Assembly:

On behalf of the Executive Staff of Wabash Valley Goodwill Industries, Inc. located in Terre Haute, and the nearly 200 employees we represent throughout West Central Indiana, to request the Senate reinstate the proposed expansion of seats for the Excel Center for Adult Learners in HB 1001.

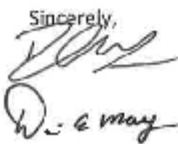
Terre Haute does not currently have an Excel Center, but could benefit greatly from its model of proven success in cultivating a workforce of educated individuals who hold a high school diploma, workforce certifications, dual credits, and beyond.

We are greatly appreciative of your work on the 2023-25 Indiana biennial budget and your consideration of the expansion of seats, as supported in both Governor Holcomb's proposed budget and the House of Representatives' adopted amendment to HB 1001. This would allow stakeholders, including the many employers who rely upon a strong workforce pipeline, in West Central Indiana, to move forward with plans to establish a Goodwill Excel Center and serve the needs of adult learners within our community.

Over the past several months, Wabash Valley Goodwill Industries and Goodwill Education Initiatives (GEI) have partnered on a feasibility study to determine the need for an Excel Center in Vigo County. The study's findings, which were released in December 2022, state that the community has a "demonstrated need for a school like the Excel Center in Vigo County and is optimistic about the success a school would have in the city..." Notably, the study showed that 10,464 individuals, 8,364 of which are over the age of 20, do not hold a high school diploma. **With our robust mix of employers and higher education institutions in the region who have already expressed interest in partnering with the Excel Center, we believe our community is uniquely positioned to benefit from a Center.**

As our region's business community continues to work collaboratively to find new and innovative ways to address the workforce crisis, the support of the Indiana General Assembly is crucial. We humbly ask for your support for our community and our request to fully fund the additional seats proposed for the Excel Centers for Adult Learners in the Governor's and the House of Representatives' budget proposals.

I appreciate your time and consideration on this important matter, and I look forward to discussing further with you at your convenience. Please do not hesitate to contact me at lwalker@wvgoodwill.org

Sincerely,

Dawn May

Dawn Davis – Safety and Logistics Director
Dawn May – WFD and Mission Director


Lisa Walker

Ashley Stanisz – Retail Operations Director
Lisa Walker – Human Resources Director

Attachment 9 - Need and Demand Analysis

The exact location of The Excel Center of West Central Indiana is yet to be determined, however, it is expected to be located within the 47804 or 47807 zip codes. The list below shows the public schools in the area that serve traditional-age high school students. The exact distance of the schools from the location is unknown. Since The Excel Center of West Central Indiana will be an adult high school, the comparison rate used in this chart is the graduation rate and Inview's College & Career Readiness measure.

SCHOOL NAME	ENROLLMENT ¹⁴	GRADUATION RATE ¹⁵	INview COLLEGE & CAREER READINESS ¹⁶
Terre Haute North Vigo High School	9th: 403	79%	80%
	10th: 375		
	11th: 373		
	12th: 356		
West Vigo High School	9th: 153	90%	76%
	10th: 141		
	11th: 129		
	12th: 111		
Terre Haute South Vigo High School	9th: 444	81%	78%
	10th: 433		
	11th: 388		
	12th: 345		
Booker T Washington High School	9th: 6	52%	19%
	10th: 14		

¹⁴ Indiana Department of Education. Data Center & Reports. *School Enrollment by Grade Level*. 9.23.23. Retrieved from <https://www.in.gov/doi/data-center-and-reports/>

¹⁵ Indiana Department of Education. Data Center & Reports. *2022 State Graduation Rate Data*. 9.23.23. Retrieved from <https://www.in.gov/doi/data-center-and-reports/>

¹⁶ Indiana Department of Education. InView 2018-2019 Cohort Data. 9.23.23. <https://inview.doe.in.gov>

	11th: 17		
	12th: 11		

Attachment 10 – Grievance Policy

The majority of staff and family concerns will be handled at the school level, with appropriate parties, and if needed, with the Director of The Excel Center. In the event that a parent or student has an objection to a Goodwill Workforce Enterprises Board of Directors policy or decision, the issue will be forwarded to The Excel Center School Director. The following steps will need to be taken:

1. The grievance form can be submitted in either paper or electric format within 3 days of the event prompting the complaint. The grievance should be attempted to be resolved at the earliest stage possible.
2. The Director will submit a written explanation of their decision in 3 business days from receiving the grievance.
3. If the School Director is unable to resolve the question or is the subject of a grievance, the student/parent/support person is able to take that request to the grievance committee. This committee will consist of the school director, lead teacher, and lead life coach.
4. If they are not satisfied with that decision the grievance can be taken to the President and CEO or the Chairperson of the GWE Board of Directors. The student will have 3 days to submit their grievance to the President and CEO or the Chairperson of the GWE Board of Directors.
5. A final decision will be made and submitted in 5 business days from receiving the grievance.
6. If the school or the school's governing board fails to address the grievance, or if you believe additional action is warranted, you may contact the school authorizer. Please be prepared to provide a detailed assessment and any corresponding documentation outlining the complaint procedure you have followed with the school.
 - a. For complaints and concerns regarding charter schools sponsored by the Indiana Charter School Board, please contact the Executive Director.

It should be noted that the President and CEO and GWE Board of Directors has an active policy not to hear on matters of expulsion, so in the event the raised issue or concern is related to expulsion, the next step of conflict mediation would be to seek restitution in the courts. If a translator is needed one will be provided by The Excel Center. If the grievance involves a special education complaint, then the designated Special Education Coordinator will be present or involved. The Excel Center has a No Retaliation Policy. Any instances of retaliation by staff or students will be subject to disciplinary measures.

Attachment 11 – Governance Documents

Receipt of 501(c)(3) Filing

An official email of the United States government

You successfully submitted your Form 1023 user fee payment to Pay.gov and the details are below. You can expect to be contacted about your application by the IRS within 180 days from the date you submitted it. After 180 days, if you haven't been contacted, you can call the toll-free Customer Account Services number, Monday through Friday, 8 a.m. - 5 p.m. (local time), at 877-829-5500 to check on the status. You will need to provide your name, your employer identification number (EIN), and the date you submitted your application when calling.

Application Name: Form 1023
Pay.gov Tracking ID: 277P7QGU
Agency Tracking ID: 76508487907
Transaction Type: Sale
Transaction Date: 09/29/2023 11:55:44 AM EDT
Account Holder Name: David P Friedrich
Transaction Amount: \$600.00
Card Type: Visa
Card Number: *****4781

THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY.

Pay.gov is a program of the U.S. Department of the Treasury, Bureau of the Fiscal Service

APPROVED AND FILED
DIEGO MORALES
INDIANA SECRETARY OF STATE
05/04/2023 10:52 AM

ARTICLES OF INCORPORATION

Formed pursuant to the provisions of the Indiana Code.

ARTICLE I - NAME AND PRINCIPAL OFFICE ADDRESS

BUSINESS ID 202305041688303
BUSINESS TYPE Domestic Nonprofit Corporation
BUSINESS NAME GOODWILL WORKFORCE ENTERPRISES, INC
PRINCIPAL OFFICE ADDRESS 2702 South 3rd Street, Terre Haute, IN, 47802, USA

ARTICLE II - REGISTERED OFFICE AND ADDRESS

REGISTERED AGENT TYPE Individual
NAME Meredith Osburn
ADDRESS 2702 South 3rd Street, Terre Haute, IN, 47802, USA
SERVICE OF PROCESS EMAIL mosburn@wvgoodwill.org

I acknowledge that the Service of Process email provided above is the email address at which electronic service of process may be accepted.

ARTICLE III - PERIOD OF DURATION AND EFFECTIVE DATE

PERIOD OF DURATION Perpetual
EFFECTIVE DATE 05/04/2023
EFFECTIVE TIME 10:21AM

ARTICLE IV - GOVERNING PERSON INFORMATION

TITLE President
NAME Meredith Osburn
ADDRESS 2702 South 3rd Street, Terre Haute, IN, 47802, USA

ARTICLE V - INCORPORATOR(S)

NAME Meredith Osburn
ADDRESS 2702 South 3rd Street, Terre Haute, IN, 47802, USA

APPROVED AND FILED
DIEGO MORALES
INDIANA SECRETARY OF STATE
05/04/2023 10:52 AM

ARTICLE VI - GENERAL INFORMATION

STATEMENT OF PURPOSE

To provide educational opportunities to enable young people to prepare for life as adults, as well as developing, owning and operating one or more charter schools as set forth in Ind. Code 20-5.5-1-1 et. seq., and for any other lawful purpose.

TYPE OF CORPORATION Public benefit corporation, which is organized for a public or charitable purpose

WILL THE CORPORATION HAVE MEMBERS? No

DISTRIBUTION OF ASSETS

Upon the dissolution or winding up of the corporation, its assets remaining after payment, or provision for payment, of all debts and liabilities shall be distributed to any nonprofit educational corporation, trust foundation or other organization which are organized and operated exclusively for the purposes set forth in these articles of incorporation, and are exempt from taxation under section 501(c)(3) of the Internal Revenue Code; however, if the recipient(s) are not in existence, or not a qualified distributee, or are unwilling or unable to accept the distribution, then the assets of the this organization shall be distributed to a fund, foundation or organization organized and operated exclusively for the purposes specified in section 501 (c)(3) of the Internal Revenue Code.

SIGNATURE

THE SIGNATOR(S) REPRESENTS THAT THE REGISTERED AGENT NAMED IN THE APPLICATION HAS CONSENTED TO THE APPOINTMENT OF REGISTERED AGENT.

THE UNDERSIGNED, DESIRING TO FORM A CORPORATION PURSUANT TO THE PROVISIONS OF THE INDIANA NONPROFIT CORPORATION ACT, EXECUTE THESE ARTICLES OF INCORPORATION.

IN WITNESS WHEREOF, THE UNDERSIGNED HEREBY VERIFIES, SUBJECT TO THE PENALTIES OF PERJURY, THAT THE STATEMENTS CONTAINED HEREIN ARE TRUE, THIS DAY May 4, 2023.

THE UNDERSIGNED ACKNOWLEDGES THAT A PERSON COMMITS A CLASS A MISDEMEANOR BY SIGNING A DOCUMENT THAT THE PERSON KNOWS IS FALSE IN A MATERIAL RESPECT WITH THE INTENT THAT THE DOCUMENT BE DELIVERED TO THE SECRETARY OF STATE FOR FILING.

SIGNATURE David P. Friedrich
TITLE Legal Representative

Business ID : 202305041688303
Filing No : 9859226

BYLAWS
OF
GOODWILL WORKFORCE ENTERPRISES, INC.
TERRE HAUTE, INDIANA

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ARTICLE I

THE CORPORATION IN GENERAL

Section 1. NAME AND DESCRIPTION. The name of the Corporation shall be Goodwill Workforce Enterprises, Inc. It is a public benefit not-for-profit corporation organized and existing under the laws of the State of Indiana.

Section 2. PURPOSE. The purposes for which the Corporation is formed are:

- A. To provide educational opportunities to enable adults to prepare for life in today's workforce, as well as developing, owning, and operating one or more charter schools as set forth in I.C. § 20-5.5-1-1. The organization is organized exclusively for charitable, religious, educational, and scientific purposes under section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code.
- B. To receive grants, borrow or otherwise raise money to carry out the above purposes from private sources or from federal, state, and local governments, under such terms and conditions as may be required by such governmental agencies or lending institutions.
- C. The Corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1954, or corresponding provisions of any subsequent federal tax laws.
- D. The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Internal Revenue Code of 1954, or corresponding provisions of any subsequent federal laws.
- E. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Internal Revenue Code of 1954, or corresponding provisions of any subsequent federal laws.
- F. The Corporation shall not make any investments in such manner as to subject it to tax under 4944 of the Internal Revenue Code of 1954, or corresponding provisions of any subsequent federal tax laws.
- G. The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Internal Revenue Code of 1954, or corresponding provisions of any subsequent federal tax laws.

- H. Notwithstanding any other provisions of these Bylaws, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by any organization exempt under Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provisions of any subsequent federal tax laws and its Regulations as they now exist or as they may hereafter be amended, or by any organization, contributions to which are deductible under Section 170(c)(2) of such Internal Revenue Code and Regulations as they now exist or as they may hereafter be amended.
- I. Upon the dissolution or winding up of the Corporation, (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the to the common school fund: and (2) the remaining funds received from the department shall be returned to the department not more than thirty (30) days after charter school ceases operation due to: (A) closure of the charter school; (B) nonrenewal of the charter school's charter: or (C) revocation of the charter school's charter. If the assets of the charter school are insufficient to pay all parties to whom the charter school owes compensation under subdivision (1), the priority of the distribution of assets may be determined by a court's; and any nonprofit educational corporation, trust foundation or other organization which are organized and operated exclusively for the purposes set forth in these Bylaws and the Articles of Incorporation and are exempt from taxation under section 501(c)(3) of the Internal Revenue Code; however, if the recipient(s) are not in existence, or not a qualified distributee, or are unwilling or unable to accept the distribution, then the assets of this organization shall be distributed to a fund, foundation or organization organized and operated exclusively for the purposes specified in section 501(c)(3) of the Internal Revenue Code or has nonprofit purposes similar to those of the Corporation.; however, any transfer to a governmental entity shall be used exclusively for public purposes.
- J. The Corporation shall be authorized to exercise and enjoy all other powers, rights and privileges granted by the provisions of the Indiana Nonprofit Corporation Act of 1991, to corporations organized thereunder, and all the powers conferred by the acts heretofore or hereunder amendatory of or supplemental to the said Act of the said laws; and the enumeration of certain powers as specified is not intended as exclusive of, or as a waiver conferred by said Act or the said laws now or hereafter in force.

Section 3. LOCATION. The principal office of the Corporation shall be located at 2702 South 3rd Street, Terre Haute, Indiana 47802.

ARTICLE II.

BOARD OF DIRECTORS OF THE CORPORATION

Section 1. **POWERS OF THE BOARD OF DIRECTORS.** The Board of Directors shall have the authority to administer and operate the Corporation and shall have and exercise all the powers which may be exercised or performed by the Corporation under law and the Bylaws.

Section 2. **COMPOSITION OF THE BOARD OF DIRECTORS.** The Board of Directors shall consist of a minimum of five (5) Directors and a maximum of seven (7) Directors. The President and Chief Executive Officer of Wabash Valley Goodwill Industries shall be an ex-officio member of the Board of Directors.

Section 3. **ELECTION OF DIRECTORS.** One-half of the authorized number of Directors (rounded to the nearest whole number) shall be appointed by Wabash Valley Goodwill Industries, Inc. Board of Directors while the remaining Directors shall be elected by the Board of Directors from a slate prepared by the Board of Directors.

Directors shall be elected for a term of three (3) years, or until his/her successor has been elected, with one-third (1/3) of the Directors elected at each Annual Meeting. No Director shall serve more than two (2) consecutive three (3) year terms until one (1) year has passed since last serving as a Director. A Director filling an unexpired term shall be eligible to serve two (2) additional three (3) year terms.

The Board of Directors shall have the authority to stagger the terms of the original Board of Directors to affect a staggered term of office. Each Director shall hold office until his/her successor shall have been duly elected and qualified. Directors may serve terms in succession if approved by a majority vote of all the members of the Board of Directors.

Section 4. **TERMINATION OF MEMBERSHIP.** Any Director may withdraw from and terminate membership on the Board of Directors by delivering a written resignation to the Secretary of the Corporation. Any Director may be removed with or without cause by a majority vote of the Directors then in Office.

Section 5. VACANCIES ON THE BOARD OF DIRECTORS. Vacancies on the Board of Directors shall be filled by election by the Board of Directors of the Corporation. The initial term of office of a Director elected to fill such a vacancy shall be equal to the unexpired term of the Director who he/she is replacing, after which he/she may be elected to regular terms as provided in these Bylaws.

Section 6. BOARD OF DIRECTORS MEETINGS. The Board of Directors shall have a minimum of four (4) meetings each calendar year at times and places fixed by the Chairperson of the Board. Board of Directors meetings shall be held upon fifteen (15) days' notice by first-class mail, electronic mail, facsimile, delivered personally or by telephone. If Board of Directors meeting notice is delivered by electronic mail (e-mail) or by facsimile transmission, a receipt confirmation must be sent to the President within 7 days of receipt of meeting notice.

Each meeting is for the purpose of electing officers and transacting business as may come before the Board. The Board of Directors may provide by resolution the time and place for holding additional regular meetings of the Board of Directors. Notice of the meeting other than by such resolution shall not be required. The nature and purpose of each meeting shall be included in a notice of the meeting and only the matter or matters included in the notice shall be on the agenda of each Board of Directors meeting.

Section 7. SPECIAL MEETINGS. Special meetings of the Board of Directors may be called by the Chairperson of the Board, or his/her designees and shall be called by the Chairperson of the Board upon the written request of a majority of the members of the Board of Directors. The nature and purpose of the special meeting shall be included in the notice of the meeting and only the matter or matters included in the notice shall be on the agenda of the special meeting.

Section 8. PLACE OF MEETING. The Chairperson of the Board may designate any place, within the State of Indiana, as the place of meeting for any regular or special meetings of the Board of Directors. If no designation is made, the place of the meeting shall be the principal office of the Corporation.

Section 9. NOTICE OF MEETING. Notice stating the place, day, and hour of any meeting, and in the case of a special meeting, the purpose(s) for which the meeting is called, shall be delivered, either orally or by mail, to the Directors entitled to vote at such meeting not less than ten (10) nor more than thirty (30) days before the

date of such meeting. If mailed, the notice of a meeting shall be deemed to be delivered when deposited in the United States mail.

- Section 10 All action required or permitted to be taken at any meeting of the Board of Directors shall be taken in accordance with the requirements of Indiana's "Open Door Law" pursuant to I.C. § 5-14-1.5.
- Section 11. MANNER OF ACTING. The act of a majority of the Directors present at a meeting at which a quorum is present shall constitute an action of the Board of Directors.
- Section 12. QUORUM. A majority of the members of the Board of Directors shall constitute a quorum for the transaction of business at all meetings of the Board of Directors.
- Section 13. VOTING BY BALLOT. Voting on any question or in any election may be by voice, unless the presiding officer orders, or a Director shall demand, that voting be by ballot.
- Section 14. INFORMAL ACTION BY DIRECTORS. Any action required or permitted to be taken at a regular or special meeting of the Board of Directors may be taken without a vote with consent in writing, setting forth the action taken that is signed by all of the Directors.
- Section 15. ATTENDANCE BY TELEPHONE OR VIDEO CONFERENCE. The Directors may participate in any meeting using a conference telephone, video conference or similar communication equipment by means of which all people participating in the meeting can hear and/or see each other simultaneously. Such participation in a meeting shall constitute presence in person at the meeting.
- Section 16. PRESUMPTION OF ASSENT. Any Director who is present at a meeting of the Board of Directors at which action on any corporate matter is taken shall be conclusively presumed to have assented to the action taken unless (1) he/she abstains and his/her abstention is recorded in the minutes of the Corporation; (2) his/her dissent shall be entered in the minutes of the meeting; (3) he/she shall file his/her written dissent to such action with the person acting as the Secretary of the meeting before the adjournment of the meeting; (4) he/she shall forward such dissent by registered mail to the Secretary of the Corporation immediately after the adjournment of the meeting. The right to dissent shall not apply to a Director who voted in favor of an action.

ARTICLE III

OFFICERS OF THE BOARD

The Board of Directors shall, at each annual meeting, elect a Chairperson, Vice Chairperson, and Secretary of the Board. Each officer shall hold office until his/her successor shall have been duly elected and qualified. The Chairperson of the Board shall appoint members of Standing and Special Committees in accordance with Article IV of these Bylaws, chair all meetings of the Board of Directors and perform such other duties as may be prescribed by the Board of Directors. The Vice Chairperson shall perform such duties as may be prescribed by the Board of Directors, and in the absence of the Chairperson, shall assume the duties of the Chairperson. The Chairperson and Vice Chairperson shall serve at the discretion of the Board and may be removed from office at any time upon majority vote of the Board of Directors.

ARTICLE IV

COMMITTEES OF THE BOARD OF DIRECTORS

- Section 1. **STANDING AND SPECIAL COMMITTEES.** The Board of Directors shall appoint such standing or special committees of such size as it may deem necessary to properly carry out the activities and affect the purposes of the Corporation. Such committees shall perform as the Board of Directors may direct. Members of such committees need not be members of the Board but shall report to the Board and perform only those functions as specifically assigned or delegated to such committee by the Board.
- Section 2. **PROCEDURES.** Procedures for committee meetings shall follow those procedures set forth in Article II for meetings of the Board of Directors.

ARTICLE V

OFFICERS OF THE CORPORATION

- Section 1. **OFFICERS.** The Officers of the Corporation shall be the same as the Officers of the Board of Directors and includes a Chairperson, a Vice Chairperson, a

Secretary and such other officers elected in accordance with the provisions of this Article. The Board of Directors may elect such other officers, including a Treasurer, one or more Assistant Secretaries and one or more Assistant Treasurers, as it shall deem desirable, such officers to have the authority to perform the duties prescribed from time to time by the Board of Directors. Any two or more offices, except that of the Chairperson, may be held by the same person.

Section 2. ELECTION AND TERM OF OFFICE. The Officers of the Corporation shall be elected annually by a majority vote of the Board of Directors at a regular annual meeting of the Board of Directors. If the election of officers shall not be held at such meeting, such election shall be held as soon thereafter as conveniently possible. New offices may be created and filled at any meeting of the Board of Directors. Each officer shall hold office until his/her successor shall have been duly elected and have been qualified.

Section 3. REMOVAL. Any officer elected by the Board of Directors may be removed by the Board of Directors for the unexpired portion of the term.

Section 4. VACANICES. A vacancy in any office because of death, resignation, disqualification or otherwise, may be filled by a majority vote of the Board of Directors for the unexpired portion of the term.

Section 5. CHAIRPERSON. The Chairperson shall be a member of the Board and of all committees of the Board and shall be entitled to vote. The Chairperson shall be the chief executive officer of the Corporation and shall be responsible for the general direction of its affairs. The Chairperson shall preside at all meetings of the Board. He/she may sign, with the Secretary or any other proper officer of the Corporation authorized by the Board of Directors, any deeds, mortgages, bonds, contracts, diplomas, or other instruments which the Board of Directors have authorized to be executed, except in cases where the signing and execution shall be expressly delegated by the Board of Directors or by these Bylaws or by law to some other officer or agent of the Corporation; and, in general, shall perform all duties incident to the office of Chairperson and such other duties as may be prescribed by the Board of Directors from time to time.

Section 6. ABSENCE OF CHAIRPERSON. In the absence of the Chairperson or in the event of his/her inability or refusal to act, the next elected officer shall perform the duties of the Chairperson, and when so acting shall have all the powers of and be subject to all restrictions upon the Chairperson.

Section 7. SECRETARY. The Secretary shall keep the minutes of the meetings of the Board of Directors in one or more books provided for that purpose; keep an accurate list of the names of the Directors and their mailing addresses; give all notices in accordance with the provisions of these Bylaws or as required by law; be custodian of the Corporation records and of the seal of the Corporation, and affix the seal of the Corporation on all documents, the execution of which on behalf of the Corporation under its seal is duly authorized in accordance with the provisions of these Bylaws.

Section 8. TREASURER. The Treasurer shall have charge and custody of and be responsible for all funds and securities of the Corporation; receive and give receipts for monies due and payable to the Corporation from any source whatsoever, and deposit all such monies in the name of the Corporation in such banks, trust companies and other depositories; and in general shall perform all the duties incident to the office of the Treasurer and such other duties as from time to time may be assigned to him/her by the Chairperson or by the Board of Directors.

ARTICLE VI

CONFLICT OF INTEREST

Section 1. INTERESTED DIRECTORS AND OFFICERS. No contract or other transaction between the Corporation and one more of its Directors, or between the Corporation and any other corporation, firm, association or other entity in which one or more of its Directors are directors or officers, or have a substantial financial interest, shall be either void or voidable for this reason alone or by reason alone that such Director or Directors are present at the meeting of the Board of Directors, or of a committee, which authorizes such contract or transaction, or that his/her or their votes are not counted for such purpose:

- 1) If the material facts to such Director's interest in such contract or transaction and as to any such common directorship, or financial interest are disclosed in good faith or known to the Board of Directors or committee, the Board of Directors or a committee authorizes such contract or transaction by a vote sufficient for such purpose without counting the vote or votes of such interested Director or officer; or
- 2) If the material facts to such Director's interest in such contract or transaction and as to any such common directorship, officership, or

financial interest are disclosed in good faith or known to the Directors, and such contract or transaction is authorized by vote of the Directors.

3) The contract or transaction is fair and reasonable to the Corporation.

Section 2. QUORUM REQUIREMENT. Common or interested directors may be counted in determining the presence of a quorum at a meeting of the Board of Directors or of a committee which authorizes such contract or transaction.

ARTICLE VII

NONDISCRIMINATION

In compliance with Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and other federal, state and local laws, the Corporation does not discriminate on the basis of age, race, sex, sexual orientation, gender identity, gender expression, religion, national or ethnic origin, disability or status as a disabled veteran in any phase of its admissions or other aspects of its educational programs or activities. No person shall be excluded from participation in or denied benefits or subjected to unlawful discrimination on such basis under any educational program or student activity.

ARTICLE VIII

DISSOLUTION OF THE CORPORATION

Upon dissolution of the Corporation, the Board of Directors shall, after paying or making provisions for the payment of all of the liabilities of the corporation, dispose of all of the assets of the Corporation as follows:

- (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the common school fund; and (2) the remaining funds received from the department shall be returned to the department not more than thirty (30) days after charter school ceases operation due to: (A) closure of the charter school; (B) nonrenewal of the charter school's charter; or (C) revocation of the charter school's charter. If the assets of the charter school are insufficient to pay all parties to whom the charter school owes compensation under subdivision (1), the priority of the distribution of

- assets may be determined by a court.; and
- (2) to such organization or organizations organized and operated exclusively for charitable, educational, religious, or scientific purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (or any corresponding subsequent federal tax laws), as the Board of Directors shall determine; however, any transfer to a governmental entity shall be used exclusively for public purposes.

ARTICLE IX

INDEMNIFICATION

- Section 1. **ACTION NOT BY OR IN THE RIGHT OF THE CORPORATION.** The Corporation shall indemnify any person who was or is a party, or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative (other than by action by or in the right of the Corporation) by reason of fact that he or she is or was a Director or officer of the Corporation, or is or was serving at the request of the Corporation as a director or officer of another corporation, partnership, joint venture, trust or other enterprise, against expenses (including attorney's fees), judgments, fines and amounts paid in settlement actually and reasonably incurred by him/her in connection with such action, suit or proceeding if he or she acted in good faith and in a manner he or she reasonably believed to be in or not opposed to the best interests of the Corporation, or with respect to any criminal action or proceeding, had reasonable cause to believe that his or her conduct was unlawful.
- Section 2. **ACTION BY OR IN THE RIGHT OF THE CORPORATION.** The Corporation shall indemnify any person who was or is a party or is threatened to be made a party to any threatened, pending or completed action or suit by or in the right of the Corporation to procure a judgment in its favor by reason of the fact that he or she is or was a Director or officer of the Corporation, or is or was serving at the request of the Corporation as a director or officer of another corporation, partnership, joint venture, trust or other enterprise against expenses (including attorney's fees) actually and reasonably incurred by him/her in connection with the defense or settlement of such action or suit if he or she acted in good faith and in a manner he or she reasonably believed to be in and not opposed to the best interest of the Corporation, except that no indemnification shall be made in respect to any claim, issue or matter as to which such person shall have been adjudged to be liable for negligence or misconduct in which such action or suit was brought shall determine upon application that, despite the adjudication of

liability by it and in view of all the circumstances of the case, such person is fairly and reasonably entitled to indemnity for such expenses which the court shall deem proper.

Section 3. EXPENSES IF SUSSESSFUL. To extent that the Director has been successful on the merits or otherwise in defense of any action, suit or proceeding referred to in Section 1 and 2 of this Article, or in defense of any claim, issue, or matter, he or she shall be indemnified against expenses (including attorney fees) actually and reasonably incurred by him/her in connection therewith. The Corporation shall provide notice to the Board of Directors prior to such indemnification.

Section 4. AUTHORIZATION. An indemnification under Section 1 and 2 of this Article (unless ordered by a court) shall be made by the Corporation only as authorized in the specific case upon a determination that indemnification of the Director, officer, employee, or agent is proper in the circumstances because he or she has met the applicable standards of conduct set forth in Section 1 and 2 of this Article. Such determination shall be made: (a) by the Board of Directors by a majority vote if a quorum is not obtainable, or even if obtainable, a quorum of disinterested Directors so directs, by independent legal counsel in a written opinion.

Section 5. ADVANCE PAYMENT. Expenses incurred in defending a civil or criminal action, suit or proceeding may be paid by the Corporation in advance of a final disposition of such action, suit or proceeding, as authorized by the Board of Directors in the specific case, upon receipt of an undertaking by or on behalf of the Director, officer, employee or agent to repay such amount, unless it shall ultimately be determined that he or she is entitled to be indemnified by the Corporation as authorized in the Article.

Section 6. NONEXCLUSIVITY. The indemnification provided by this Article should not be deemed exclusive of any other rights to which those indemnified may be entitled under contract, agreement, vote of disinterested Directors or otherwise, both as to action in his or her official capacity and as to action in another capacity while holding such office, and shall continue as to a person who has ceased to be a Director, officer, employee or agent and shall continue as to a person who has ceased to be a Director, officer, employee or agent and shall inure to the benefit of the heirs, executors and administrators of such a person.

Section 7. INSURANCE. By action of the Board of Directors, notwithstanding any interest of the Directors in such action, the Corporation may purchase and maintain insurance, in such amounts as the Board of Directors may from time to time deem

appropriate, on behalf of any person who is or was a Director or officer of the Corporation, or is or was serving at the request of the Corporation as a director, trustee or officer of another corporation, partnership, joint venture, trust or other enterprise in which the Corporation directly or indirectly has an interest, against any liability incurred by him/her in any such capacity, or arising out of his/her status as such, whether or not the Corporation would have all the power to indemnify him/her against such liability.

ARTICLE X

WAIVER OF NOTICE

Whenever any notice is required to be given under the provisions of the Indiana Nonprofit Corporation Statute I.C.23-17-1-1 et. seq. or these Bylaws, a waiver in writing signed by the person or persons entitled to such notice, whether before or after the time stated, shall be deemed equivalent to the giving of such notice. Attendance at any meeting shall constitute a waiver of notice unless the Director attends the meeting and objects to the transaction of business or other consideration of a specific matter because proper notice was not given.

ARTICLE XI

FISCAL YEAR

The fiscal year of the Corporation shall be July 1 through June 30.

ARTICLE XII

MISCELLANEOUS

The Corporation shall not be controlled by or receive direction from individuals or entities seeking profit from its or its activities.

ARTICLE XIII

ADOPTION AND AMENDMENT OF BYLAWS

These Bylaws may be adopted, altered, amended, or repealed at any meeting of the Board of Directors of the Corporation, providing notice of such adoption, alteration, amendment, or repeal has been given in the notice of the meeting, or upon unanimous consent in writing executed by the Directors. Amendments and modifications to these Bylaws may be initiated by a vote of the Directors of the Corporation. Final action on such proposals is the exclusive responsibility of the Directors of the Corporation. Not less than every two (2) successive years, the Directors of the Corporation, at the Annual Meeting of the Board of Directors, shall review these Bylaws for the purpose of considering any appropriate amendments thereto.

Dated this _____ day of September 2023.

Meredith Osburn, Ex-Officio Director

Mary Halsted, Director

Betsy Peperak, Director

Ryan Keller, Director

Kristin Craig, Director

John Lukens, Director

Rene Hankins, Director

Leah Allman, Director

GOODWILL WORKFORCE ENTERPRISES, INC.
STATEMENT OF VALUES AND CODE OF ETHICS FOR

I. Mission.

The stated mission of Goodwill Workforce Enterprises, Inc. (“Goodwill Enterprises”), as approved by its board of directors, is to provide educational opportunities to enable young people to prepare for life as adults, as well as developing, owning, and operating one or more charter schools. All activities of Goodwill Enterprises shall support that mission, and all who work for or on behalf of Goodwill Enterprises shall understand and be loyal to that mission and purpose.

II. Personal and Professional Integrity.

All staff, board members and volunteers of Goodwill Enterprises shall act with honesty, personal and professional integrity, and openness in all their dealings as representatives of Goodwill Enterprises.

A former director applying for employment with Goodwill Workforce Enterprises, Inc. or Wabash Valley Goodwill Industries, Inc. must not have served as a director for either entity for a minimum of one (1) year prior to applying for a job.

III. Governance.

The board of directors of Goodwill Enterprises shall assume responsibility for setting the mission and strategic direction of Goodwill Enterprises by overseeing the finances, operations, and policies of Goodwill Enterprises. Without limiting the generality of the foregoing, the board of directors shall:

- A. Ensure that its officers, directors and employees have the requisite skills and experience to carry out their duties and that all officers, directors and employees understand and fulfill their government’s duties acting for the benefit of Goodwill Enterprises and its public purpose;
- B. Adopt and enforce a conflict-of-interest policy that ensures that any conflicts of interest or the appearance of a conflict of interest are avoided or appropriately managed through disclosure, recusal or other means;
- C. Be responsible for the regular review of the performance of the President and Chief Executive Officer (“CEO”) and their interaction with the board of directors.;
- D. Ensure that the President and CEO and appropriate staff provide the board of directors with timely and comprehensive information so the board can effectively carry out its duties;
- E. Ensure that Goodwill Enterprises conducts all transactions and dealings with integrity and honesty;

- F. Ensure that Goodwill Enterprises promotes working relationships with staff, volunteers and program beneficiaries that are based on mutual respect, fairness and openness;
- G. Ensure that Goodwill Enterprises is fair and inclusive in its hiring and promotion policies and practices for all staff and volunteer positions; and
- H. Ensure that the resources of Goodwill Enterprises are responsibly and prudently managed.

IV. Legal Compliance.

The board of directors and the President and CEO shall ensure that Goodwill Enterprises and its staff is knowledgeable of and complies with all laws and regulations related to the activities of Goodwill Enterprises.

V. Responsible Stewardship.

Goodwill Enterprises shall manage its funds responsibly and prudently. The board of directors of Goodwill Enterprises shall take steps to ensure that the corporation:

- A. Spends a reasonable percentage of its annual budget on programs in pursuit of its mission;
- B. Spends an adequate amount on administrative expenses to ensure effective accounting systems, internal controls, competent staff, and other expenditures critical to professional management;
- D. Does not accumulate operating funds successfully;
- E. Regularly reviews the effectiveness of its programs and adopts mechanisms to incorporate lessons learned into future programs;
- F. Provides comprehensive and timely information to the public, the media, and all stakeholders, and is responsive in a timely fashion to reasonable requests for information;
- G. Ensures that all spending practices and policies are fair, reasonable, and appropriate to fulfill its mission; and
- H. Prepare financial reports that are factually accurate and complete in all material respects.

GOODWILL WORKFORCE ENTERPRISES, INC.’s
CONFLICT-OF-INTEREST POLICY AND ACKNOWLEDGEMENT OF POLICY

I. Purpose.

The purpose of this conflict-of-interest policy is to protect Goodwill Workforce Enterprises, Inc.’s interest when it is contemplating entering into a transaction or arrangement that might benefit the private interests of an officer or director of the corporation. This policy is intended to supplement, but not replace, any applicable state laws or regulations governing conflicts of interest.

II. Definitions.

- A. “Board” shall mean the corporation’s board of directors.
- B. “Committee” shall mean any committee of the Board having powers delegated to it by the Board.
- C. Any director, principal officer or member of a committee who has a direct or indirect financial interest, as defined below, is an “Interested Person”. If a person is an Interested Person with respect to any member of an affiliated group of entities of which the corporation is a part, he/she is an Interested Person with respect to all entities in such group.
- D. A person has a “Financial Interest” if the person has, directly or indirectly, through business, investment, or family:
 - (1) An ownership or investment interest in any entity with which the corporation has a transaction or arrangement;
 - (2) A compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement; or

- (3) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.
- (4) Compensation includes direct and indirect remuneration, as well as gifts or favors that are substantial in nature.

III. Procedures.

- A. **Duty to Disclose.** In connection with any actual or possible conflict of interest, an Interested Person must disclose the existence of his/her Financial Interest and all material facts to the Board and the committee considering the proposed transaction or arrangement.
- B. **Determining Whether a Conflict of Interest Exists.** After disclosure of the Financial Interest and all material facts and after any discussion with the Interested Person, he/she shall leave the board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or committee members shall decide if a conflict of interest exists.
- C. **Procedures for Addressing a Conflict of Interest.**
 - (1) An Interested Person may make a presentation at the board or committee meeting, but after such presentation, he/she shall leave the meeting during the discussion of and vote on the transaction or arrangement that results in the conflict of interest.
 - (2) The chairperson of the board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
 - (3) After exercising due diligence, the board shall determine whether the corporation can obtain a more advantageous transaction or arrangement with reasonable efforts from a person or entity that would not give rise to a conflict of interest.
 - (4) If a more advantageous transaction or arrangement is not reasonably attainable under the circumstances that would not give rise to a conflict of interest, the board or committee, by a majority vote of the disinterested directors, whether the transaction or arrangement is in the corporation's best interest and for its own benefit and whether the transaction is fair and reasonable to the corporation, and shall make its decision as to whether to enter into the transaction or arrangement in conformity with such determination.
- D. **Violation of the Conflict of Interest Policy.**

- (1) If the board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- (2) If, after hearing the response of the member and making such further investigation as may be warranted and the circumstances, the board or committee determines the member has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

IV. Record of Proceedings.

The minutes of the board or committee shall contain:

- A. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board or committee's decision as to whether a conflict of interest existed.
- B. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

V. Compensation.

- A. A voting member of the governing board who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.
- B. A voting member of any Committee whose jurisdiction includes compensation matters and receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.
- C. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

VI. Annual Statements.

Each director, principal officer and member of a committee with governing Board delegated powers shall annually sign a statement which affirms such person:

- A. Has received a copy of this conflict-of-interest policy;
- B. Has read and understands the policy;
- C. Has agreed to comply with the policy; and
- D. Understands the corporation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.
- E. A former director applying for employment with Goodwill Workforce Enterprises, Inc. or Wabash Valley Goodwill Industries, Inc. must not have served as a director for either entity for a minimum of one (1) year prior to applying for a job.

VII. Periodic Reviews.

To ensure the corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- A. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and a result of arms-length bargaining.
- B. Whether partnerships, joint ventures, and arrangements with management organizations conform to the corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or an excess benefit transaction.

As a member of the Board of Directors of Goodwill Workforce Enterprises, Inc., I have read the **CONFLICT-OF-INTEREST POLICY WITH RESPECT TO POTENTIAL CONFLICTS OF INTEREST** and agree to comply with the policy.

Signature

Attachment 12 – Statement of Assurances

Exhibit D

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 conformance with all federal and state laws, including Indiana Charter Schools Laws 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 this 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 power, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiters Access to Students and Student Resembling Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act and amendments.
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 statements contained above.

Meredith A. Osborn

Name

President + CEO

Title

Meredith Osborn

Signature

8/16/2023

Date

Attachment 13: School Startup Plan

The Excel Center of West Central Indiana Startup Plan		
MONTH	ACTIVITY	RESPONSIBLE
Sept-23	Submit Charter Application	School Director
Oct-23	Capacity Interview	Board
Oct-23	Public Hearing	Board
Dec-23	ICSB Public Meeting	Board and School Director
Jan-24	Ensure Facility Timeline is accurate	School Director
Jan-24	Create interest form	School Director
Jan-24	Launch website and social media	School Director
Jan-24	Begin due diligence on purchases (technology, SIS, furniture, etc.)	School Director
Jan-24	Develop school marketing plan (plan for community presentations, door-to-door, brochures, direct mailing, open houses, and answering inquiry phone calls)	School Director
Feb-24	Finalize Staff Handbook	School Director
Feb-24	Purchase relevant curriculum, curricular materials, and educational platform (not provided by GEI)	School Director
Feb-24	Purchase technology	School Director
Feb-24	Purchase Furniture	School Director
Feb-24	Create student handbook	School Director
Feb-24	Conduct community outreach for partnership and recruitment pipeline	School Director
Mar-24	Develop School Emergency Plan	School Director
Mar-24	Formalize Weather Notification Plan	School Director
Mar-24	Select Registrar and MOA and issue offer letter	School Director
Mar-24	Select Lead Teachers, Lead Coach, CCR and issue offer letters	School Director/Board
Mar-24	Finalize Student Discipline Plan	School Director/Board
Mar-24	Finalize Student Handbook (including attendance, promotion and grading policies.)	School Director/Board
Mar-24	Set-up network infrastructure	School Director
Mar-24	Set-up technology hardware with all necessary software and programming	School Director
Mar-24	Formalize staff professional development plans	School Director
May-24	Leadership team Training by National Office	School leadership team
Apr-24	Interview for all staff positions	School Director

Apr-24	Receive Board approval for all school policies and plans	Board
Apr-24	Finalize plans for serving students with special needs	School Director
Apr-24	Data entry into SIS, including student demographics, schedules, etc.	School Director
Apr-24	Transcribe student transcripts and enter data into SIS	MOA
Apr-24	School specific process/procedure training	School leadership team
Apr-24	Student information system Training	School leadership team
May-24	Identify local college/university to work with in granting dual credit and certifications	School Director
May-24	Select all other staff and issue offer letters	School leadership team
May-24	Create/Finalize course progression and course catalog	School Director
May-24	Arrange for all mandatory testing	School Director
May-24	Orientation training	School leadership team
May-24	Students complete enrollment paperwork and retrieve copies of their high school transcripts, if available	School leadership team
Jun-24	Registrar and MOA training	Registrar and MOA
Jun-24	CCR overview training	CCR Specialist
Jun-24	Facility sign off by all necessary parties (i.e., health inspectors, fire marshal, etc.)	Board
Jun-24	Complete facility renovation/construction	Board
Jun-24	Norms, Expectations, and Culture creations	School leadership team
Jun-24	Evaluation Process Creation and training	School leadership team
Jun-24	All staff training visit to Indiana	All School Staff
Jun-24	Life Coaching/Barrier Removal Training	Lead Coach and Coaching team
Jun-24	Teaching in an Excel Center Training	Lead Teacher and Teaching Team
Jun-24	Curriculum Training	Lead Teacher and Teaching Team
Jun-24	Sped overview training	Special Education Coordinator
Jun-24	Training over school level goals and Review Operations manual and contract requirements	All staff
Jun-24	Training over department level goals and individual goals	All staff
Jun-24	Graduation/Credit process	School leadership team
Jun-24	Data Reviews/Coach-Teacher Process	All staff
Jul-24	Hold open house/block party for recruitment and awareness	All staff

Jul-24	Arrange classrooms and instructional and work environments	All staff
Jul-24	Scheduling	Lead Coach and Coaching team
Jul-24	Conduct student orientation and student pre-assessments	All staff
Jul-24	Finalize students' schedules based on pre-assessment results and transcripts	Lead Coach and Coaching team
Jul-24	Coordinate schedule for students with special needs	Coaches and Special Ed Coordinator
Jul-24	Develop preliminary student schedules	Coaches
Jul-24	Revise and finalize student schedules	Lead Coach and School Director
Jul-24	Work with students/parents to develop or review IEPs or Section 504 plans, as necessary	Special Education Coordinator
Aug-24	National team to Terre Haute to assist with first week of classes	All Staff and GEI
August 1, 2024	FIRST DAY OF CLASSES	ALL STAFF

Attachment 14 – Insurance Estimate

Property: Rates for Property Insurance are in extreme turbulence currently and very dependent on risk mitigation measures in place (ie. fire suppression systems, construction type, protection class), but we would estimate that the coverage would cost anywhere between .10 - .15 per hundred dollars of replacement cost value. (Assuming that you will own and insure a building)

Ex - \$1,000,000 Building's premium would be \$10,000 - \$15,000

General Liability - Predicting a \$15-20 per-student cost, so (according to 300 student prediction) a \$4,500 - \$6000 GL spend. This is a little high for this space, but, with a new venture, we would expect carriers to rate on the higher side.

Workers Compensation - Predicting .30 per \$100 of payroll on average; on a blended basis (combining all different class codes)

Ex - \$1,500,000 of payroll would be \$4,500 of premium

Umbrella - Normally safe to assume around \$1,000 of premium per \$Million of coverage

Ex - \$3,000 premium for \$3,000,000 Umbrella Limits

Auto Liability - Assuming no exposure and negligible premium for hired and non-auto coverage

**NOT-FOR-PROFIT ORGANIZATION
MANAGEMENT LIABILITY
INSURANCE PROPOSAL**

Prepared for:

GOODWILL WORKFORCE ENTERPRISES, INC.

Presented by:

GIBSON EDGE

In conjunction with:

RT ProExec

September 2023

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I. INTRODUCTION



Generally speaking, the Management Liability Insurance (MLI) marketplace for not-for-profit organizations is stable. Insurance carriers participating in this segment, which typically includes a broad mix of Directors & Officers (D&O), Employment Practices (EPL) and Fiduciary Liability coverage, are maintaining premiums and retentions flat - absent any material changes in the risk or poor loss experience. Whereas this is the general approach by insurance companies, if an insured is located in certain geographical areas, such as California or Washington, elevated premiums and retentions may be sought by insurance carriers. Further, there are industry groups, such as educational organizations, country clubs and homeowners associations or other real estate related concerns, that are drawing higher premiums and retentions, and at times, restrictive terms and conditions.

We have detailed your Management Liability Insurance proposal in the following pages. Section II provides details of the terms and conditions received from Nexus. Section III, IV and V provide an overview of the exposures facing not-for-profit organizations. Section VI follows with an overview of a duty to defend policy and Section VII concludes with a discussion of issues on which to focus when completing the application.

We appreciate the opportunity to be of assistance to the Goodwill Workforce Enterprises, Inc. with regard to its Management Liability Insurance needs and look forward to discussing our proposal with you in greater detail.

II. PROPOSAL

NON-PROFIT MANAGEMENT LIABILITY RENEWAL PROPOSAL

INSURER: Professional Solutions Insurance Company (Nexus) – *Admitted*

RATING: A.M. Best: A “*Excellent*” FSC: IX

FORM: **MPF-10GTC-07-19**

DEFENSE: Duty to Defend

EFFECTIVE: One year

DISCOVERY: One year at 100% additional premium on a bilateral basis

CONTINUITY: Inception

LIMIT & PREMIUM

LIMIT (PER CLAIM AND IN THE AGGREGATE)

PREMIUM

\$1,000,000 D&O LIMIT

\$5,246 + \$150 POLICY ADMIN FEE

RETENTIONS

\$ 0 each D&O Claim for non-indemnifiable Loss

\$15,000 each D&O Claim for indemnifiable Loss and Entity Claim

CONTINGENCIES

The above non-binding indication is expressly contingent upon carrier’s acceptable review of the items below:

1. Please provide current BOD list.
2. Please currently sign and date the previously submitted application.

ENDORSEMENTS

1. MPE-000IN-07-19 Indiana Amendatory Endorsement
2. MPE-01015-07-19 Disclosure Pursuant to TRIA
3. MPE-01017-07-19 Cap on Losses from Certified Acts of Terrorism
4. MPE-02013-07-19 Network Security and Privacy Exclusion
5. MPE-12005-07-19 Education Amendatory – D&O

- Amend the definition of Executive to include duly elected or appointed chancellor, regent, provost, dean, governor, personnel director, university counsel or other comparable senior administrator
 - Amend the definition of Insured Person to include faculty member, guidance counselor, administrator, student teacher, teaching assistant, faculty aide, student while serving in a supervised internship program, association member, member manager or alumni counsel member of the College
 - Amend the definition of Loss to include fines and penalties levied against an Insured for violation of any Specified Regulatory Legislation
 - Amend the definition of Personal Injury Wrongful Act to include any violation of the Buckley Amendment of the Uniform Student Freedom of Expression Act
 - Amend the definition of Wrongful Act to include any Educator's Liability Wrongful Act
 - Add definitions for Governmental Funding Claim, Sexual Misconduct, and Specified Regulatory Legislation
 - Amend the BI/PD exclusion from introductory "for" language to "based upon, arising out of"
 - Add exclusion for Professional Services with carveback for Educator's Liability
 - Add exclusion for Sexual Misconduct
 - Specified Regulatory Legislation Coverage - \$100,000 sublimit
 - Governmental Funding Coverage - \$500,000 sublimit with \$500,000 retention & 50% co-insurance
6. Additional A-Side limit: \$500,000
 7. Securityholder Investigative Costs: \$250,000 sublimit
 8. Asset Protection Costs: \$100,000 sublimit
 9. Public Relation Costs: \$100,000 sublimit
 10. D&O Crisis Management Expenses: \$25,000 sublimit
 11. Internal Revenue Code Violations: \$100,000 sublimit
 12. Excess Benefit Transaction Excise Taxes: \$100,000 sublimit

III. D&O EXPOSURES AND CLAIMS FOR NOT-FOR-PROFIT ORGANIZATIONS

In today's litigious society, no one, including not-for-profit organizations, can escape the threat of litigation. Many not-for-profit organizations do not have the financial wherewithal to withstand costly litigation; they are usually governed by strict financial guidelines, under which available resources are ear-marked to fund operations rather than be kept in the organization's coffers. Regardless of whether a given lawsuit has merit, the legal expenses incurred in defending such suits can be quite costly and may financially impair an organization.

The Bridgespan Group, a nonprofit advisor and resource for not-for-profit organizations, outlines 10 basic responsibilities for the Board:

Determine mission and purpose. It is the board's responsibility to create and review a statement of mission and purpose that articulates the organization's goals, means, and primary constituents served.

Select the Chief Executive. Boards must reach consensus on the chief executive's responsibilities and undertake a careful search to find the most qualified individual for the position.

Support and evaluate the Chief Executive. The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization.

Ensure effective planning. Boards must actively participate in an overall planning process and assist in implementing and monitoring the plan's goals.

Monitor and strengthen programs and services. The board's responsibility is to determine which programs are consistent with the organization's mission and monitor their effectiveness.

Ensure adequate financial resources. One of the board's foremost responsibilities is to secure adequate resources for the organization to fulfill its mission.

Protect assets and provide proper financial oversight. The board must assist in developing the annual budget and ensuring that proper financial controls are in place.

Build a competent board. All boards have a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate their own performance.

Ensure legal and ethical integrity. The board is ultimately responsible for adherence to legal standards and ethical norms.

Enhance the organization's public standing. The board should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.

Claims can also emanate from a number of sources, including donors, beneficiaries, members, state attorneys general and other government officials involving anti-trust or anti-competitive issues, tax issues, misallocation of funds and membership disputes. The following page lists a number of sample claims that have been brought against non-profit organizations and their directors and officers. [It is important to remember that, in addition to any settlements and judgments, defense expenses can be extremely costly.](#)

SAMPLE CLAIMS (AS PROVIDED BY CHUBB AND E-RISK SERVICES)

Creditor A non-profit organization under severe financial constraints took out a bridge loan that was personally backed by a board member. The creditor alleges that the organization is in default on the debt and demands immediate payment.

Defense costs exceeded \$30,000.

Breach of Contract A wealthy benefactor agreed to donate over \$2 million to a local non-profit organization. In exchange for the large donation, the organization agreed to put up an engraving recognizing the claimant in making this generous gift. The Insured later decided not to put up the engraving in the agreed upon area because of “aesthetic” concerns.

A court ruled that the organization had to put up the engraving in the agreed upon location. The defense costs exceeded \$150,000.

Improper Voting of Directors Members of a country club alleged negligence and breach of fiduciary duty against the club and certain board members stemming from the improper voting and election of its board of directors. Plaintiffs alleged that due to the failure to follow proper voting protocol, certain board members were elected who then mismanaged the club through self-dealing and other improper acts.

Settlement (including new elections) and defense exceeded \$100,000.

Breach of Fiduciary Duty An Independent Physician Association (IPA) filed for bankruptcy. A group of creditors sued each member of the board of directors for breach of fiduciary duty, alleging that a series of improper distribution reaching nearly \$2 million was made by the board members, which caused the IPA’s insolvency, violating several state statutes. Specifically, the plaintiffs alleged breaches of the fiduciary duties of loyalty and care and violations of state non-profit laws. The plaintiffs also sought to have the court certify them as representatives of a class of unsecured creditors. The plaintiffs sought more than \$2 million in damages, plus attorneys’ fees and costs.

The case settled for approximately \$250,000. In addition, defense expenses and forensic accounting costs totaled more than \$300,000.

Breach of Fiduciary Duty, Mismanagement A suburban not-for-profit hospital, experiencing financial difficulties, entered into a strategic business alliance with a third party. Under the agreement, the third party would manage the day-to-day operations of the hospital and eventually acquire it. The contemplated sale was unsuccessful and the hospital filed for bankruptcy protection. The creditors sued the hospital’s directors and officers alleging mismanagement in the period prior to insolvency, as well as breach of fiduciary duty in not accepting a competing

offer to sell, which was not subject to financing contingencies. The defendants argued that the competing offer would not have satisfied outstanding obligations and would certainly have forced a bankruptcy filing. The defendants also argued that their decision to accept the chosen offer was protected under the business judgment rule.

The parties negotiated a settlement with the creditors in excess of \$3 million and incurred over \$2 million in defense costs.

Breach of Fiduciary Duty A not-for-profit regional health system entered into numerous joint ventures with various for-profit entities. The IRS audited these joint ventures under the “community benefit standard” – the IRS benchmark for determining whether a not-for-profit 501(c)(3) organization is entitled to receive and maintain tax-exempt status. The IRS determined that several of the health system’s joint ventures with for-profit entities did not meet the community benefit standard, and the IRS revoked the system’s tax-exempt status. Resulting bondholder claims alleged breach of fiduciary duty by the board for not scrutinizing the issues regarding joint ventures between for-profit entities and the health system.

The bondholders’ breach of fiduciary duty claims settled for more than \$3 million.

IV. EMPLOYMENT PRACTICES LIABILITY INSURANCE



Employment Practices Liability Insurance (EPL) emerged in 1991 in response to the passage of the Civil Rights Act of 1991. This law allowed punitive damages to be awarded in employment discrimination cases and provided for jury trials in cases of discrimination (juries have historically been much more sympathetic to employees than they are to employers). These heightened exposures paved the way for an increase in employee civil rights lawsuits and created the need for an insurance product to protect against claims alleging offenses such as discrimination, wrongful termination and sexual harassment.

The EPL policy provides coverage to the directors, officers, employees and the organization entity of an Insured. Traditionally coverage was provided only for the aforementioned discrimination, wrongful termination and sexual harassment. Coverage has been significantly expanded to provide varying levels of coverage for other common law allegations such as failure to supervise and negligent hiring. Given that the plaintiff's bar has steadily increased its focus on employment issues year after year, it is important that the EPL policy be written with terms and conditions as broad as possible to position the policy to respond favorably to widening allegations.

Further, as mentioned above, punitive damages are a significant exposure in employment related litigation. It is therefore essential that the EPL policy cover punitive damages, although the degree to which punitive damages are insurable varies from state to state. This issue should be discussed with your legal counsel. Additionally, carriers also offer Third Party EPL coverage, which provides protection in the event that a suit alleging sexual harassment or discrimination is brought by a person other than an employee (i.e. customers, clients or other non-employees with whom your organization interacts).

Another issue which has become prominent over the past several years is the so called "wage and hour" law litigation being brought by or on behalf of employees who allege that they were not paid properly for overtime or given adequate breaks pursuant to state and/or federal "wage and hour laws". Generally speaking, EPL policies do not cover this exposure; however a limited number of carriers have begun to provide a sub-limit to respond to at least some of the defense costs associated with these suits.

EPL EXPOSURES AND CLAIMS

FACTS ABOUT EMPLOYMENT EXPOSURES

Employment practices related lawsuits have become ubiquitous in today's litigious culture. It is hard to find an organization who, on at least one occasion, has not been faced with demands from a disgruntled employee or former employee.

Consider the facts:

- The Equal Employment Opportunity Commission (EEOC) recorded 89,385* charges in 2015:
 - 39,757 charges of retaliation discrimination (up 4.7%)
 - 31,027 charges of race discrimination (flat)
 - 26,396 charges of sex discrimination (up 1.4%)
 - 26,968 charges of Americans with Disabilities Act violations (up 5.2%)
 - 20,144 charges of Age Discrimination in Employment Act violations (down 2.2%)
 - 9,438 charges of national origin discrimination (down 1.5%)
 - 3,502 charges of religious discrimination (down 1.3%)
 - 973 charges of Equal Pay Act violations (up 3.7%)

*** The number for total charges reflects the number of individual charge filings. Because individuals often file charges claiming multiple types of discrimination, the number of total charges for any given fiscal year will be less than the total types of discrimination listed.**

SAMPLE EPL CLAIMS (AS PROVIDED BY CHUBB AND E-RISK SERVICES)

Retaliation, Tortious Interference A director of continuing education who was employed under contract by a professional association brought a complaint to the state Attorney General against the association. Her complaint alleged that members of the association were signing into sessions at required continuing education sessions at conferences but immediately departing the premises to golf without attending the sessions. The conference administrator knowingly allowed this to occur. The association then suspended the director, alleging poor performance. The director, in turn, sued the association for retaliation under the state statute protecting whistleblowers, and she also alleged tortious interference with her employment contract and that the poor performance charges against her were trumped up. She demanded more than \$1.5 million.

The case settled for nearly \$775,000. Total defense costs were more than \$150,000.

Pregnancy Discrimination A controller at a non-profit organization alleges wrongful termination based on pregnancy discrimination. The claimant was fired while she was on maternity leave. The organization asserts that she was fired for budgetary reasons which were caused by the claimant's own conduct. Her employer never documented any of her poor performance and a director purportedly made disparaging comments about the number of employees who recently became pregnant.

Settlement and defense exceeded \$200,000.

Racial Discrimination A supervisor at a non-profit organization alleges that her employment was wrongfully terminated in retaliation for complaining about a subordinate's racist comments which created a hostile work environment for her. She further alleges that when she complained to management, they did not investigate her allegations but instead told her to take care of it herself. When this only created more tension, she was fired a month later.

Settlement and defense exceeded \$250,000.

Retaliation Two former employees of a chamber of commerce allege that they were bullied, subjected to a hostile work environment, and eventually fired in retaliation for testifying in support of a prior coworker's claim of sexual harassment against their employer.

Total defense and settlement exceeded \$700,000.

Sexual Harassment An employee was terminated by a national charity as part of an organization-wide reduction in force. The former employee later sued the organization and her former manager, alleging sexual harassment, intentional infliction of emotional distress, wrongful termination, and sex discrimination. She sought \$375,000, plus reimbursement of legal fees. The organization responded by stating the ex-employee's termination was justified and proper: Her personnel file showed she had regularly been tardy for work, had conflicts with managers, performed erratically, frequently talked about her sex life, and made vulgar comments at work. However, it also came to light through discovery proceedings that management had not sufficiently addressed previous inappropriate remarks and jokes made by several other employees because management had assumed no one had been offended.

A court ruled against the charity and ordered it to pay the plaintiff \$225,000 plus her legal fees. In addition, the charity incurred \$185,000 in defense costs.

Race and Age Discrimination An African-American senior vice president served as an interim CEO of a trade association. While the trade association's board conducted a search for a permanent CEO, the interim CEO received high marks for his performance. The trade association's search committee ultimately selected an outside candidate – a white male who was much younger than the interim CEO. The interim CEO's attorney sent a demand letter to the trade association alleging age and race discrimination and seeking damages that included front pay and compensation for mental anguish and emotional distress.

The case settled in advance of litigation for more than \$700,000, plus \$75,000 in legal fees incurred to that point.

V. FIDUCIARY LIABILITY INSURANCE



Organizations maintaining employee benefit plans should include Fiduciary Liability coverage (FLI) in their executive liability insurance portfolio. FLI protects plan fiduciaries against claims alleging breaches of their duties to the plan, its participants and their beneficiaries, as well as claims arising out of errors and omissions in the administration of the plan. “Administration” generally refers to the giving of counsel or advice to plan participants, record keeping and the managing of plan enrollment, cancellation or termination.

While an Employee Benefits Liability endorsement to a General Liability policy does provide some protection for administration, it does not provide coverage for breach of fiduciary duty under ERISA, which is also specifically excluded under the D&O policy. It is important to note that, like D&O and EPL, FLI also provides coverage for the costs incurred in defending such claims.

ERISA defines plan fiduciaries as those having discretionary authority or discretionary responsibility in the administration of plan assets. These can include a plan’s sponsor (the organization), its employees, plan trustees, the administrator and the directors of the sponsor to the extent they perform such functions.

ERISA sets the framework for the conduct expected of fiduciaries in carrying out their duties to the plan. It also sets prohibitions on certain transactions that could be construed as being self-dealing, a conflict of interest or are made with parties in interest to a plan.

FLI may be purchased on a stand-alone basis, or as a shared or sublimit to the D&O coverage.

FLI is generally very affordable and can often contemplate retention amounts as low as \$0 to \$2,500, depending upon the number of plans, the total assets in the plan and the types of plans to be covered.

As with D&O and EPL coverage, the policy is a claims-made form and, in many cases, is written on a duty-to-defend basis, meaning that the insurance company is responsible for conducting defense of the claim with expert counsel that they retain.

FIDUCIARY EXPOSURES AND CLAIMS

FACTS ABOUT FIDUCIARY EXPOSURES

ERISA makes plan fiduciaries personally liable to the plan for any losses resulting from breaches of their duties. The Act provides that a fiduciary must make good to the plan any losses resulting from such breach of duty and restore to the plan any profits made by the fiduciary through the use of plan assets. The Act stipulates that civil action may be brought by a participant or a beneficiary for “appropriate relief.” Since ERISA, other laws have also been enacted that impose further obligations upon fiduciaries, including the Consolidated Omnibus Budget Reconciliation Act (COBRA) and the Retirement Protection Act of 1994.

Plan participants and their beneficiaries are not the only parties that can bring claims against fiduciaries; the agencies responsible for enforcing ERISA – the Department of Labor and the Pension Benefit Guaranty Corporation – are also potential claimants. Fiduciary liability claims can include allegations of improprieties in the funding or termination of plans, denial of or changes in benefits, amendments to plan documents, investment of plan assets, benefit calculations or in the selection of investment managers, mutual funds or insurance companies. In addition, civil penalties of 20% of the amount recovered in a settlement with a fiduciary or the amount a court orders the fiduciary to pay back to a plan or its participants may be imposed under ERISA. A fiduciary can also be fined by the Internal Revenue Service for engaging in prohibited transactions.

BASIC FIDUCIARY DUTIES OWED TO A PLAN:

Duty of Loyalty, which stipulates that a fiduciary must act solely in the interest of the plan, its participants and beneficiaries and for the exclusive purpose of serving plan- related goals.

Duty of Prudence, which encompasses separate duties of care, skill, prudence and diligence in the management of a plan.

Duty of Diversification in the investment of plan assets. There are, however, certain exceptions to the diversification requirement for “eligible individual account plans” such as Employee Stock Ownership Plans (ESOPs) and profit-sharing plans that permit the investment in company stock in an amount exceeding 10% of plan assets.

Duty to Follow Plan Documents and to discharge all duties in strict accordance with such documents.

SAMPLE FIDUCIARY CLAIMS (AS PROVIDED BY CHUBB)

Administrative Error A community charity association manager, earning \$60,000 annual salary, died in an automobile accident. The manager’s widow, who was the primary beneficiary of his group life insurance, wrote a letter to the association’s management claiming that the life insurance benefit paid to her under the benefit plan should have been five times her deceased husband’s salary, not two times his salary. The association denied the widow’s benefit claim. She sued, alleging that, although the benefit amount had been twice his salary at one time,

her husband had requested that the amount be changed to five times just weeks prior to his death. The agency denied that any change had been requested.

After the association investigated the widow's claim in litigation, it learned that indeed her spouse had requested an increase in the amount of his group insurance coverage, but that the request had not been properly processed. As a result of this revelation, the association settled the widow's case for more than \$250,000. Its defense costs exceeded \$25,000.

Negligent Selection of Advisor The internal investment manager hired by a large museum to manage investments of its retirement plan was allegedly skimming money off the top of employees' retirement fund contributions. He was also a relative of the museum's plan administrator and, therefore, a thorough criminal background check was not performed. The Department of Labor (DOL) discovered the scheme during a spot audit. The DOL issued a letter advising the museum of its findings and demanding that it and the investment manager make the plan whole (i.e., replace the funds that were stolen, as well as the investment income the funds would have earned had they been invested as directed by the participants.) if the plan was not made whole, the DOL would pursue additional courses of action, including litigation.

The museum settled with the DOL prior to litigation and agreed to contribute more than \$2 million to the employees' retirement accounts, the amount of funds allegedly skimmed from the top of the employees' contributions and the investment income the funds would have earned had they been invested as directed by the employees, Total legal fees incurred by the museum topped \$75,000.

VI. DEFENDING CLAIMS: DUTY-TO-DEFEND POLICIES

All Management Liability policies are “claims made” forms and are either written on a “duty-to-defend” or an “indemnity” basis (although a few forms do give the Insured the option to assume their own defense or tender defense to the carrier). Under both forms, defense costs erode the limit of liability. Not-For-Profit Organization Liability Insurance policies are largely written on a Duty to Defend basis.

WHAT IS A “DUTY-TO-DEFEND” POLICY?

The Insurance Company hires the defense counsel and pays for the costs of defending a Claim.

“A Claim has Been Noticed. What Next?”

The Insurance Company appoints defense counsel from a list that includes firms pre-selected for their experience and pre-set rate structures.

“Who Controls the Defense and Settlement?”

The Insurance Company retains control of defense and settlement strategy. If the Insured refuses to agree to a recommended settlement offer, the carrier will tender defense back to the Insured and will only pay for a) defense costs incurred up to the date of the rejected settlement; b) the amount of the recommended settlement and c) a percentage of the difference between the recommended and final settlements.

“In a Nutshell, What are the Pros & Cons?”

Pro: The Insured does not have to seek out a qualified defense firm or negotiate rates. Without fee or billing disputes, claim handling is often smoother.

Pro: In many jurisdictions, a duty to defend policy obligates an insurer to defend an entire claim as long it contains at least one covered allegation.

Con: The Insured does not have the freedom to select their counsel or negotiate the settlement. The Insurer’s duty-to-defend ends if the Insured rejects a settlement opportunity.

VII. COMPLETING THE INSURANCE APPLICATION



As discussed in the previous section management liability insurance policies are "claims-made" contracts, meaning that the policy only covers claims first made within the policy period. However, the alleged "wrongful act" underlying the claim can have occurred either during the policy period or prior to its inception. In order to have coverage for all such claims, the policy must be written either without a **Prior Acts Exclusion** or with a **Retroactive Date** that is backdated to provide a sufficient amount of retrospective coverage. Most policies are written without a Prior Acts exclusion unless there was a certain event such as a change in control or serious claim situation in the past.

Although "prior acts" may not be excluded, the carrier will specifically exclude matters disclosed in the organization's answer to the **warranty statement** in the application. When an organization first buys management liability insurance (or adds additional excess limits), it must represent and warrant to the insurer that no person or entity proposed for the insurance is aware of any fact, situation or circumstance that could lead to a claim (the wording varies somewhat among insurers). This is universally referred to as a "warranty statement." Care must be taken to provide a full and candid response to the warranty question, as any misrepresentation or omission can have serious implications should a claim eventually result out of facts or circumstances that ought to have been disclosed.

In addition to the exclusion of any specific matters revealed in the application, every policy contains **Prior and Pending Litigation Exclusion** or "P&P" exclusion applicable to any litigation that occurred before, or is pending as of, the inception of the policy term. It is important to note that the exclusion will also apply to a claim *arising out of or related to* any pending or prior litigation. The P&P date with respect to a first time purchaser of a management liability insurance policy will be policy inception. Each time the insured adds a new excess layer of coverage, the P&P date for each respective layer will match the inception date of the new layer.

When a management liability policy is renewed with the incumbent insurer and at the same or lesser limit or scope of coverage, the policyholder is not required to repeat its warranty statement and the prior and pending litigation date remains the date on which the policyholder first purchased that level of coverage. If an organization moves its management liability policy from one insurer to another, it of course wants that transition to be as seamless as possible, thereby maintaining **continuity** of coverage. To ensure that continuity is maintained, the replacement insurer must agree to do two things: (1) waive the requirement for an updated warranty statement from the insured and (2) use the prior and pending litigation date that was originally imposed for that particular level of insurance (commonly referred to as "backdating" the exclusion). When both of these occur, the insurer is said to have provided "continuity" of coverage. When a client purchases management liability insurance for the first time "continuity" is not an issue, but becomes a key factor at future renewals.

Finally, please note that any notice of claim(s) or circumstances that could give rise to a claim made under a management liability policy will be excluded from coverage under any renewal or replacement policy. This is known as the **Prior Notice Exclusion** and is contained in every management liability policy due to the “claims-made” nature of the form. Whenever an insured is faced with a decision to move coverage from one carrier to another, it is always wise to consult with counsel before doing so to ensure that future coverage will not be jeopardized by the interplay of the pending and prior litigation exclusion, the prior notice exclusion and the knowledge warranty.

Finally, please take special care with regard to the receipt of **EEOC notices**, as the definition of “Claim” can vary between the various carriers’ policy forms. In most cases **EEOC notices** do trigger the definition of “Claim” and should thus be reported to the Insurer under the Notice of Claim provision. Therefore, all of your supervisory personnel should be instructed to report all such notices to management immediately.

A SPECIAL NOTE REGARDING SUBSIDIARIES

The management liability insurance policy typically covers any entity that meets the policy definition of **Subsidiary**. Covered Subsidiaries do not need to be listed on the Declarations Page or scheduled by endorsement. Also note that attaching a schedule of “Named Insureds” to an application will not result in coverage to any entity that does not meet the policy definition of Subsidiary. Further, For-Profit Entities are not covered. Additionally, many not-for-profit organizations have **affiliated entities** that may share common management; however, unless specifically added by endorsement there is no coverage for an affiliated entity nor any of its directors, officers, managers or employees. Carriers have traditionally been willing to add affiliates to the policy by an endorsement – if so requested and when provided with the necessary additional underwriting information.

Attachment 15: The Excel Center Enrollment Policy

Enrollment Process

The Excel Center is structured to fit the academic and life needs of adults earning a high school diploma. The Excel Center recommends that students who meet the following description apply:

- Age 18 or older¹⁷
- Have dropped out of school or are significantly behind their cohort in school.

Because The Excel Center is a public charter school that is open to all students, there may be a small number of students who apply that do not fit this description. As a public charter school, The Excel Center will accept every Indiana resident who applies to attend the school when a seat is available.

Definitions

1. Enrolled Student: A student enrolled in The Excel Center's student information system upon meeting the particular criteria described below.
2. Withdrawn Student: A student transferred from being enrolled in the active status within the school's student information system to inactive status, based on meeting particular criteria
3. Absence: A student who did not attend any of his or her scheduled classes during a particular instructional day
4. Attend: A student attends an in-person class by being physically present, and attends a credit recovery class by logging in to the designated online student coursework tracking system

Admission Requirement

There are minimal requirements that must be met in order to be admitted into The Excel Center. All admitted students must:

- Be an Indiana resident,
- Not already been issued any state-recognized high school diploma (from any state), and
- Not be listed on any state or federal sexual offender registry.¹⁸

Procedures for Enrollment

On an ongoing basis, Goodwill Workforce Enterprises will provide information to community groups, potential new students, and other individuals inquiring about enrollment at The Excel Center. The school's manager of office administration and other school staff will answer any questions the inquiring individual has about the school.

To enroll in The Excel Center, a student must complete an online enrollment form, which includes basic demographic information, and a request for a transcript from the student's last school of attendance. In cases where a student is having difficulty obtaining his/her transcripts, The Excel Center staff will provide assistance to request that information.

Step 1: Application

- Adults interested in enrolling at The Excel Center should submit an application online, request a paper application, or visit The Excel Center to complete a paper application.
 - The application includes name and contact information; demographic information, and home language survey

¹⁷ Students under the age of 18 will be required to attend a meeting with the School Director, accompanied by their parent or guardian. The purpose of the meeting is to ensure both the student and parent/guardian understand that The Excel Center is designed to be an adult environment and that the student and parent/guardian understand that the student will be attending school as a minor alongside adults.

¹⁸ Because The Excel Center operates a child care center for children ages 6 weeks to 12 years old, The Excel Center has a policy to not admit individuals who are listed on any state or federal sexual offender registry. Prospective students are asked to disclose this information prior to completing enrollment forms and are, by law, required to disclose their status.

Step 2: Submit a Transcript

- Applicants should contact their last high school of attendance and ask for their transcript to be submitted to The Excel Center registrar.
 - In cases where a student is having difficulty obtaining his/her transcripts, The Excel Center staff will provide assistance to request that information.
 - In cases where a student has never earned high school credits at any previous school, students will be asked to sign a “Zero Credit Disclosure” form.

Step 3: Participate in orientation

- Orientation is required before the student may begin classes.
 - During orientation, students learn about the culture of The Excel Center as well as the expectations of all students. Students complete online registration including information about whether the student plans to use the child care center; and information regarding any previous IEP/special education services. Students also participate in diagnostic math and reading assessments to help determine students’ skill levels for initial course placements.

Step 4: Attend Class

- Steps 1–3 must be completed before a student is able to begin classes at The Excel Center. In order to be enrolled, a student must attend class and must be scheduled in the school’s student information system.

Any applicant who partially completes the enrollment process for a given term will be asked to complete the enrollment process and begin classes the following enrollment window.

Lottery

In the first year of operation, if more students apply for the school than can be accommodated, The Excel Center will hold a lottery to determine which students will be enrolled. The date of the lottery will be publicly posted and announced, and all students who have applied to enroll in The Excel Center will be contacted directly to be notified of the lottery. The lottery will typically take place 3 weeks prior to the first day of the academic calendar.

The lottery will only include students who have completed all enrollment forms, either online or in-person. Numbers will be drawn at random and students whose number is selected will be offered the opportunity to enroll at The Excel Center right away. Students whose number is not selected will be added to the waiting list in the order that their number is drawn. The Excel Center will not offer preference slots in its lottery.

Waiting List Procedures

During The Excel Center’s academic year, some students will leave the school, either by graduating or by withdrawing from the school. When this happens, the student’s vacated space in the school will be back-filled by students on the waiting list. The waiting list is maintained year-round with students who wish to enroll in the school during the next phase of enrollment. Students are added to the waiting list on a first-come, first-served basis and are queued until the next orientation takes place.

To accelerate the student’s integration into the school, students on the waiting list are encouraged to fill out the online application and locate their transcript prior to being notified of an open space. Students will be selected from the waiting list on a first-come, first-served basis.

Re-Enrollment Policy

Students who withdraw from The Excel Center are able to re-enroll in the school. If an enrolled student withdraws, they may re-enroll by reapplying and going through the enrollment process outlined above. The orientation may be waived at a school director’s discretion on a case-by-case basis.

Withdrawal Policy

The Excel Center's primary objective is to propel adults toward their career goals by empowering them to earn high school diplomas and prepare for the next steps toward college and career attainment. Further, the typical Excel Center student faces multiple challenges that may prevent an uninterrupted progression toward a diploma.

Only one of the following must be met for an enrolled student to be withdrawn:

- The student formally withdraws by completing a Withdrawal Form.
- The student states in writing to a school official that he or she does not plan to return, or that he or she needs a break from class. This may include, but not be limited to illness, pregnancy, family issues, work, etc.
- A student who accrues cumulative absences of more than 10 days within a term; and/or does not respond to interventions from the school can be withdrawn; for minor students, the school will follow the procedures for appropriately reporting educational neglect to DCS and/or missing children to the Clearinghouse upon withdrawal.

Attachment 16 – Budget Projections Workbook

School Enrollment Projections

(must align with Charter Application Enrollment Plan)

School Name: **The Excel Center of West Central Indiana**
 Planned Opening Year: **2024** REQUIRED
 Planned Location: **Vigo County School Corp** REQUIRED

Is the proposal for an Adult High School (please see requirements below): Yes
 Complete Enrollment Line 31 only.

Enrollment	Year 1	Year 2	Year 3	Year 4	Year 5
Kindergarten					
Grade 1					
Grade 2					
Grade 3					
Grade 4					
Grade 5					
Grade 6					
Grade 7					
Grade 8					
Grade 9					
Grade 10					
Grade 11					
Grade 12					
Total K-12 Enrollment:	0	0	0	0	0
Adult Learners (1)	150	200	300	300	300
Total Adult Enrollment:	150	200	300	300	300
Estimated % of Students:					
Special Education					
English Learners					
Free/Reduced Priced Lunch					
Virtual Students (2)					
K-12 Distribution (3)	\$ -	\$ -	\$ -	\$ -	\$ -
Adult Distribution (4)	\$ 1,012,500.00	\$ 1,350,000.00	\$ 2,025,000.00	\$ 2,025,000.00	\$ 2,025,000.00

Notes & Definitions

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:

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

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.

Annual Operating Budget and Cash Flow Projections -- Fiscal Year 0 -- Pre-Opening Period

School Name: The Excel Center of West Central Indiana
 Planned Opening Year: 2024

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 includes the words "(please describe)" a specific description of the item must be provided in the appropriate box in Column N on Tab 5.
 Failure to provide a description as requested may result in rejection of the submission.

REVENUE	July	August	September	October	November	December	January	February	March	April	May	June	Year 0 Totals
Federal Revenue - See Footnotes													
Public Charter School Program Grant (1)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Federal Revenue (please describe on Tab 5)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Federal Revenue:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Revenue													
Contributions and Donations from Private Sources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Revenue (please describe on Tab 5)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Other Revenue:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUE:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EXPENSES													
Personnel Expenses													
Wages, Benefits, & Payroll Taxes	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 19,241.49	\$ 19,241.49	\$ 53,324.70	\$ 173,106.21
Total Personnel Expenses:	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 9,033.17	\$ 19,241.49	\$ 19,241.49	\$ 53,324.70	\$ 173,106.21
Instructional Supplies and Resources													
Curricular Materials	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Library/Media Services (Other than Staff)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology Supporting Instruction (computers, tablets, etc.)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Assessment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Instructional Software	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 20,000.00
Enrichment Programs (athletics or extra-curricular activities)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Instruction Supplies (not including technology)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Instructional Supplies and Resources:	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 1,666.67	\$ 20,000.00
Administrative Resources													
Administrative Technology - Computers & Software (not SIS)	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.35	\$ 1,583.35	\$ 19,000.00
Other Administrative Expenses (please describe on Tab 5)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Administrative Resources:	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.33	\$ 1,583.35	\$ 1,583.35	\$ 19,000.00
Governing Board Expenses													
Legal Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.35	\$ 5,000.00
Other Governing Board Expenses (please describe on Tab 5)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Governing Board Expenses:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.33	\$ 833.35	\$ 5,000.00
Purchased or Other Services (do not include staff expenses)													
Audit Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Payroll Services	\$ -	\$ -	\$ 21.82	\$ 21.82	\$ 21.82	\$ 21.82	\$ 21.82	\$ 21.82	\$ 21.82	\$ 65.46	\$ 65.46	\$ 327.30	\$ 610.96
Financial Accounting	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.37	\$ 40,000.00
Printing, Publishing, Duplicating Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Telecommunication & IT Services	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.33	\$ 3,333.35	\$ 3,333.35	\$ 40,000.00
Insurance (non-facility)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 250.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 3,750.00
Mail Services	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 40.00	\$ 480.00
Special Education Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Information Services or Systems	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Food Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transportation Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Marketing Expenses	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 3,750.00	\$ 45,000.00
Other Services (please describe on Tab 5)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Professional Purchased or Other Services:	\$ 10,706.66	\$ 10,706.66	\$ 10,728.48	\$ 10,728.48	\$ 10,728.48	\$ 10,728.48	\$ 11,061.81	\$ 11,061.81	\$ 11,061.81	\$ 11,355.45	\$ 11,355.48	\$ 38,617.36	\$ 158,840.96
Facilities Expenses (do not include staff expenses, e.g. custodian)													
Facility Lease/Mortgage Payments (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Capital Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Principal Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Leases	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Depreciation Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance (Facility)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Purchase of Furniture, Fixtures, & Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Electric & Gas	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 8,000.00
Water & Sewage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 4,000.00
Repair and Maintenance Services (including cost of supplies)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Custodial Services (including cost of supplies)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Waste Disposal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Security Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Facility Expenses (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Facilities Expenses:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 96,600.00	\$ 105,600.00
Other Expenses - See Footnotes													
Management Fee (2)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bank Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Expenses (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Other Expenses:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL EXPENSES:	\$ 22,989.83	\$ 22,989.83	\$ 23,011.65	\$ 23,011.65	\$ 23,011.65	\$ 23,011.65	\$ 24,178.31	\$ 24,178.31	\$ 27,178.31	\$ 37,680.27	\$ 37,680.32	\$ 222,353.49	\$ 511,275.27
CHANGE IN NET ASSETS:	\$ (22,989.83)	\$ (22,989.83)	\$ (23,011.65)	\$ (23,011.65)	\$ (23,011.65)	\$ (23,011.65)	\$ (24,178.31)	\$ (24,178.31)	\$ (27,178.31)	\$ (37,680.27)	\$ (37,680.32)	\$ (222,353.49)	\$ (511,275.27)

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

School Name: **The Excel Center of West Central Indiana**
 Planned Opening Year: **2024**

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 includes the words "(please describe)" a specific description of the item must be provided in the appropriate box in Column N on Tab 5. Failure to provide a description as requested may result in rejection of the submission.

REVENUES	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	Additional Information	
State Revenue - See Footnotes								
Basic Tuition Support / Adult Learners Grant - From Tab 2	\$ 1,012,500.00	\$ 1,350,000.00	\$ 2,025,000.00	\$ 2,025,000.00	\$ 2,025,000.00	\$ 2,025,000.00	Other State Grants (Row 28)	
Special Education Grant - From Tab 2	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Honors Diploma/Academic Performance Grant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Career and Technical Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Non-English Speaking Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Charter and Innovation Network School Grant (\$1,400 per student)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Formative (Interim) Assessment Grant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
State Matching Funds for School Lunch Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Curricular Material Reimbursement Program (\$150 per student)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Remediation Testing Grant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Teacher Appreciation Grant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Other State Grants (please describe) (1)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total State Revenue:	\$ 1,012,500.00	\$ 1,350,000.00	\$ 2,025,000.00	\$ 2,025,000.00	\$ 2,025,000.00	\$ 2,025,000.00		
Federal Revenue - See Footnotes								
Public Charter School Program Grant (2)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		Other Federal Revenue (Row 40)
Charter Facilities Assistance Program Grant (2011)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
IDEA- Part B Grant (Special Education)	\$ 4,000.00	\$ 4,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00		
Title I	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Title II	\$ 2,500.00	\$ 2,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00		
Federal Lunch Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Federal Breakfast Reimbursement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Other Federal Revenue (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Federal Revenue:	\$ -	\$ 6,500.00	\$ 6,500.00	\$ 13,500.00	\$ 13,500.00	\$ 13,500.00		
Other Revenue - See Footnotes								
Contributions and Donations from Private Sources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Other Revenue (Row 49)	
Student Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Other Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Other Revenue (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Other Revenue:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
TOTAL REVENUE:	\$ -	\$ 1,019,000.00	\$ 1,356,500.00	\$ 2,038,500.00	\$ 2,038,500.00	\$ 2,038,500.00		
EXPENSES								
Administrative Staff - See Footnote (3)								
Executive Administration: Office of Superintendent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Total Administrative Staff:	
School Administration: Office of the Principal	\$ 70,000.00	\$ 73,543.00	\$ 75,382.00	\$ 75,382.00	\$ 75,382.00	\$ 75,382.00		
Other School Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Business Manager/Director of Finance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Administrative Staff:	\$ 70,000.00	\$ 73,543.00	\$ 75,382.00	\$ 75,382.00	\$ 75,382.00	\$ 75,382.00		
Instructional Staff								
Teachers - Regular	\$ 215,000.00	\$ 302,500.00	\$ 500,000.00	\$ 522,000.00	\$ 544,000.00	\$ 544,000.00	Total Instructional Staff:	
Teachers - Special Education	\$ 47,000.00	\$ 47,500.00	\$ 50,000.00	\$ 52,000.00	\$ 54,000.00	\$ 54,000.00		
Substitutes, Assistants, Paraprofessionals, Aides	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Summer School Staff	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Instructional Staff:	\$ 262,000.00	\$ 350,000.00	\$ 550,000.00	\$ 574,000.00	\$ 598,000.00	\$ 598,000.00		
Non-Instructional/Support Staff - See Footnotes								
Social Workers, Guidance Counselors, Therapists	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Other Support Staff (Row 77)	
Instructional Support Staff (4)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Other Support Staff (please describe) (5)	\$ 239,500.00	\$ 278,750.00	\$ 355,000.00	\$ 358,750.00	\$ 362,500.00	\$ 362,500.00		
Nurse	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Librarian	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Information Technology	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Maintenance of Buildings, Grounds, Equipment (including Custodial Staff)	\$ 30,000.00	\$ 30,250.00	\$ 30,500.00	\$ 30,750.00	\$ 31,000.00	\$ 31,000.00		
Security Personnel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Athletic Coaches	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Non-Instructional/Support Staff:	\$ 269,500.00	\$ 309,000.00	\$ 385,500.00	\$ 389,500.00	\$ 393,500.00	\$ 393,500.00		
Subtotal Wages and Salaries:	\$ 601,500.00	\$ 732,543.00	\$ 1,010,882.00	\$ 1,038,882.00	\$ 1,066,882.00	\$ 1,066,882.00		

Payroll Taxes and Benefits - From Tab 3										
Social Security/Medicare/Unemployment	\$	61,052.25	\$	74,353.11	\$	102,604.52	\$	105,446.52	\$	108,288.52
Health Insurance	\$	17,100.60	\$	21,546.72	\$	30,165.36	\$	31,673.76	\$	33,257.52
Retirement Contributions	\$	47,805.30	\$	57,431.34	\$	78,239.04	\$	80,505.60	\$	82,772.16
Other Compensation (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-
Total Payroll Taxes and Benefits:	\$	173,106.21	\$	125,958.15	\$	153,331.17	\$	211,008.92	\$	217,625.88
Total Personnel Expenses:	\$	173,106.21	\$	727,458.15	\$	885,874.17	\$	1,221,890.92	\$	1,256,507.88
Instructional Supplies and Resources										
Curricular Materials	\$	-	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00
Library/Media Services (Other than Staff)	\$	-	\$	-	\$	-	\$	-	\$	-
Technology Supporting Instruction (computers, tablets, etc.)	\$	13,832.50	\$	5,000.00	\$	16,000.00	\$	16,000.00	\$	16,000.00
Student Assessment	\$	6,000.00	\$	7,500.00	\$	7,500.00	\$	7,500.00	\$	7,500.00
Instructional Software	\$	6,000.00	\$	7,500.00	\$	7,500.00	\$	7,500.00	\$	7,500.00
Professional Development	\$	20,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00
Enrichment Programs (athletics or extra-curricular activities)	\$	-	\$	-	\$	-	\$	-	\$	-
Other Instruction Supplies (not including technology)	\$	2,000.00	\$	20,000.00	\$	20,000.00	\$	20,000.00	\$	20,000.00
Total Instructional Supplies and Resources:	\$	47,832.50	\$	47,000.00	\$	58,000.00	\$	58,000.00	\$	58,000.00
Administrative Resources										
Administrative Technology - Computers & Software (not SIS)	\$	19,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00
Other Administrative Expenses (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-
Total Administrative Resources:	\$	19,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00
Governing Board Expenses										
Legal Services	\$	5,000.00	\$	3,500.00	\$	3,500.00	\$	3,500.00	\$	3,500.00
Other Governing Board Expenses (please describe)	\$	5,246.00	\$	5,246.00	\$	5,246.00	\$	5,246.00	\$	5,246.00
Total Governing Board Expenses:	\$	10,246.00	\$	8,746.00	\$	8,746.00	\$	8,746.00	\$	8,746.00
Purchased or Other Services (do not include staff expenses)										
Audit Services	\$	-	\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	10,000.00
Payroll Services	\$	610.96	\$	3,927.60	\$	4,713.12	\$	6,284.16	\$	6,284.16
Financial Accounting	\$	40,000.00	\$	40,000.00	\$	40,000.00	\$	40,000.00	\$	40,000.00
Printing, Publishing, Duplicating Services	\$	2,000.00	\$	750.00	\$	750.00	\$	750.00	\$	750.00
Telecommunication & IT Services	\$	40,000.00	\$	30,000.00	\$	30,000.00	\$	30,000.00	\$	30,000.00
Insurance (non-facility)	\$	-	\$	-	\$	-	\$	-	\$	-
Travel	\$	3,750.00	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00
Mail Services	\$	480.00	\$	480.00	\$	480.00	\$	480.00	\$	480.00
Special Education Administration	\$	-	\$	2,520.00	\$	2,520.00	\$	2,520.00	\$	2,520.00
Student Information Services or Systems	\$	27,000.00	\$	21,000.00	\$	21,000.00	\$	21,000.00	\$	21,000.00
Food Services	\$	-	\$	-	\$	-	\$	-	\$	-
Transportation Services	\$	-	\$	7,500.00	\$	10,000.00	\$	15,000.00	\$	15,000.00
Marketing Expenses	\$	45,000.00	\$	5,000.00	\$	2,500.00	\$	2,500.00	\$	2,500.00
Other Services (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-
Total Professional Purchased or Other Services:	\$	158,840.96	\$	122,177.60	\$	122,963.12	\$	129,534.16	\$	129,534.16
Facilities Expenses (do not include staff expenses, e.g. custodian)										
Facility Lease/Mortgage Payments (please describe)	\$	-	\$	120,000.00	\$	120,000.00	\$	120,000.00	\$	120,000.00
Capital Improvements	\$	-	\$	-	\$	15,000.00	\$	20,000.00	\$	25,000.00
Other Principal Payments	\$	-	\$	-	\$	-	\$	-	\$	-
Operating Leases	\$	3,600.00	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00
Interest Payments	\$	-	\$	-	\$	-	\$	-	\$	-
Interest Expense	\$	-	\$	-	\$	-	\$	-	\$	-
Depreciation Expense	\$	-	\$	-	\$	-	\$	-	\$	-
Insurance (Facility)	\$	-	\$	6,000.00	\$	6,000.00	\$	6,000.00	\$	6,000.00
Purchase of Furniture, Fixtures, & Equipment	\$	70,000.00	\$	7,000.00	\$	7,000.00	\$	7,000.00	\$	7,000.00
Electric & Gas	\$	8,000.00	\$	24,000.00	\$	24,000.00	\$	24,000.00	\$	24,000.00
Water & Sewage	\$	4,000.00	\$	12,000.00	\$	12,000.00	\$	12,000.00	\$	12,000.00
Repair and Maintenance Services (including cost of supplies)	\$	-	\$	30,000.00	\$	30,000.00	\$	30,000.00	\$	30,000.00
Custodial Services (including cost of supplies)	\$	-	\$	6,000.00	\$	6,000.00	\$	6,000.00	\$	6,000.00
Waste Disposal	\$	-	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00
Security Services	\$	20,000.00	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,500.00
Other Facility Expenses (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-
Total Facilities Expenses:	\$	105,600.00	\$	209,500.00	\$	224,500.00	\$	229,500.00	\$	234,500.00
Other Expenses - See Footnotes										
Indiana Charter School Board Administrative Fee (6)	\$	3,391.88	\$	10,125.00	\$	15,187.50	\$	15,187.50	\$	15,187.50
Management Fee (7)	\$	-	\$	-	\$	-	\$	-	\$	-
Bank Fees	\$	-	\$	-	\$	-	\$	-	\$	-
Escrow	\$	-	\$	-	\$	-	\$	-	\$	-
Other Expenses (please describe)	\$	-	\$	36,000.00	\$	36,000.00	\$	36,000.00	\$	36,000.00
Total Other Expenses:	\$	-	\$	39,391.88	\$	46,125.00	\$	51,187.50	\$	51,187.50
TOTAL EXPENSES:	\$	514,625.67	\$	1,164,273.63	\$	1,356,208.29	\$	1,708,858.58	\$	1,748,475.54
CHANGE IN NET ASSETS:	\$	(514,625.67)	\$	(145,273.63)	\$	291.71	\$	329,641.42	\$	290,024.46

Other Compensation (Row 93)

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Other Instructional Supplies and Resources (Row 107)

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This cost includes fees for dual credit classes as well as certifications, supplies for the drop-in center, school supplies, and field trips for students to go to places of employment.

Other Administrative Expenses (Row 113)

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Other Governing Board Expenses (Row 119)

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Premiums for Liability Insurance for GWE Board of Directors

Other Services (Row 137)

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Lease, Mortgage, & Other Facilities (Rows 142, 157)

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This is the estimated cost of leasing a 20000 sq. ft. building at \$6 per square foot.

Other Expenses (Row 166)

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Annual payment to GEI for licensing and use of images.

Attachment 17 – Budget Narrative

YEAR 0

I. REVENUE

State Revenue

None.

Federal Revenue

None.

Other Revenues

Wabash Valley Goodwill Transfers: In Year 0, GWE will use funds from the Wabash Valley Goodwill to cover start-up costs associated with opening an adult high school. These transfers are projected to begin in March prior to school opening and total \$514,014.71. All eligible grants and sponsorships are currently being pursued.

II. EXPENDITURES

Personnel Expenses

Wages, Benefits, and Payroll Taxes: Assumes a School Director will begin in July 2023 a year prior to school opening, a Lead Instructor, Lead Life Coach, and Drop-In Manager will begin in approximately April prior to school opening, remaining Instructors, Coaches, a College and Career Readiness Specialist, Office Administrator-Manager, Drop-In attendants, and Janitor will begin in approximately June prior to school opening. Expenditures are projected to be prorated across the timeline, based on average salaries for each position.

Instructional Supplies and Resources

Technology: Technology expenditure in Year 0 include administrative software, network infrastructure, etc.

Computers: This will include costs for computers for the students as well as computers for the computer lab.

Professional Development: This covers the fee to GEI for Phase 4 of the Charter process. In this phase GEI will provide staff training on The Excel Center model, positional standard operating procedures, curriculum use, and more.

Administrative Resources

Administrative Computers: Assumes each staff member has a computer.

Office Supplies: Assumes general costs for paper, pencils, folders, staples, etc.

Governing Board Expenses

Legal Services: Costs are projected at \$833.33 per month, beginning in January prior to the school opening. Legal costs relate to start-up expenditure and general allocation of services. This will include review of board policies and school handbooks for compliance with applicable Indiana laws.

Other Governing Board Expenses: This expense is to cover the premiums for the Liability Insurance for the Goodwill Workforce Enterprises Board of Directors.

Purchased or Other Services

Financial Accounting: This cost will be to an outside entity to help with the opening of the school and to ensure we stay in compliance with all local, state, and federal accounting guidelines.

Printing Services: This will be for promotional and marketing materials.

Telecommunications & IT Services: This will be to a local IT service provider for maintenance and support for telecommunications & IT services.

Travel: Travel includes reimbursable mileage related to staff travel for professional development, meetings, and other school-related activities.

Mail Services: Costs include direct student mailings for purposes of student recruitment and informing students of upcoming important dates and information regarding the school.

Student Information System: This cost is based on estimates for the setup and support of the SIS.

Marketing: RJL Solutions was hired support staff and student recruitment, marketing, and public relations starting in early 2024 leading up to the opening of the school.

Facilities

Rent, Mortgage, or other facility cost: Rent costs will not begin until July 1 of the year of the school opening.

Operating Leases: This cost includes the leasing of 2 printers for The Excel Center.

Insurance: This will be the cost for the insurance premiums for the facility.

Purchase of furniture, fixtures, and equipment: This initial cost will be for the furniture for The Excel Center. This is based on items already on hand as well as estimates for items that need to be purchased.

Electric & Gas: This will include the fees starting in the March before the opening. Calculated at \$2000 per month.

Water & Sewage: This will include the fees starting in the March before the opening. Calculated at \$1000 per month.

Security Services: This will be for the initial setup of a security system at the school.

Other

None

YEARS 1-5

SCHOOL ENROLLMENT PROJECTIONS: The Excel Center of West Central Indiana anticipates having 150 students enrolled in Year 1, 200 students enrolled in Year 2, and then 300 students enrolled in Years 3-5 and subsequent years after that.

I. REVENUE

State Revenue

Basic Grant: Current line items in Indiana's state budget provide \$6,750.00 per Adult Learner Student.

Federal Revenue

Public Law 101-476 (IDEA): Based on the funding received by other Excel Centers an approximate amount of \$20,500.00 will be assumed for Year 1 and then an approximate amount of \$41,000.00 will be assumed for Years 2-5.

Other

Sponsorships and Grants: The Excel Center of West Central Indiana will continue to pursue any and all applicable grants or sponsorship opportunities.

II. EXPENDITURES

Personnel Expenses

Wages, Benefits, and Payroll Taxes: In Year 1 staffing includes 1 School Director; 4 Instructors, 1 Lead Instructor, 1 Special Education Coordinator; 1 Lead Life Coach, 1 Life Coach; 1 College and Career Readiness Coordinator; 1 Manager of Office Administration; 1 Drop-In Center Manager; 2

Drop-In Center Attendants; and 1 Janitor. Year 2 will have the same staffing numbers with the addition of 2 Instructors bring the total number of Instructors to 6 and the addition of 1 Life Coach brings the total number of Life Coaches to 2. Year 3 will see the addition of 4 Instructors bring the total number of Instructors to 10. There will also be an addition of 2 Life Coaches bringing the total number of Life Coaches to 4. Years 4 and 5 will have no additions to the staff. All salaries will be reviewed periodically to stay competitive with local school districts. A \$500 raise will be added to certified staff each year. A \$250 raise will be added to non-certified staff for each year. The Director's raises will be tied to enrollment numbers. Benefits and Payroll taxes have been calculated at approximately 21%.

Instructional Supplies and Resources

Textbooks: Although The Excel Center uses minimal textbooks, textbooks are budgeted for as a means to provide supplemental texts and resources.

Technology: This expense will cover the repair and replacement of students' laptops as well as the computers in the computer lab.

Assessment Materials: Assessment materials for diagnostic and formative assessments are estimated at a cost of \$7500 based on estimates.

Instructional Software: This cost includes the Edmentum Courseware application and is estimated at a cost of \$7500 based on estimates.

Professional Development: Professional development has been calculated at a rate of \$5000.00 per year for staff.

Other Instructional Supplies: This cost will include the supplies needed in a classroom such as pencils, paper, folders, etc. This cost also includes the fees for Dual Credit courses as well as the fees for Certification courses. We have allocated \$10000 per year for the Dual Credits and Certification courses. Supplies for the drop-in center as well as fees for field trips are calculated here as well.

Administrative Resources

Administrative Technology: This cost will include the repair and replacement of staff computing devices. This cost will also include the purchase and fees for cell phones for the Director, Lead Life Coach, and Lead Instructor. \$8000 is allotted for the staff computing devices and \$2000 for the cell phones.

Other Administrative Expenses: None

Governing Board Expenses

Legal Services: This will be for continuing legal services as well as assistance with educational legal issues.

Other Governing Board Expenses: This will be for the cost of the premium on the Liability Insurance for the GWE Board of Directors.

Purchased or Other Services

Audit Services: This cost will cover the yearly audit that must be submitted for The Excel Center.

Financial Services: This cost is to an outside entity to help manage the financials for The Excel Center and to ensure compliance with all local, state, and federal laws and regulations regarding accounting.

Printing, Publishing, and Duplicating Services: This cost will cover promotional as well as marketing materials for the Excel Center to aid in student recruitment and retention.

Telecommunications & IT Services: This is expense is for continued support and maintenance of the telecommunication and IT systems at the school.

Travel: This cost includes reimbursable mileage to staff for professional development, meetings, and other school-related activities.

Mail Services: This will cover the costs of postage for connecting with potential students as well as staying in contact with current students.

Special Education Administration: Expenses are projected for any contracted services as required by a student's IEP or Section 504 Plan that is not generally provided by the school.

Student Information System: This cost will include the continued licensing and support of the student information system.

Transportation: Expenses are calculated at \$50 per student to cover the cost of removing the transportation barrier. This could include bus passes, gas cards reimbursement, or other means used to ensure students have transportation to and from school.

Marketing: This cost will include continuing marketing and public relations support from RJL Solutions to assist with recruitment of staff and students.

Facilities Expenses

Facility Lease/Mortgage Payments: The Excel Center will select a rental facility of approximately 20000 square feet at a cost of approximately \$6 per square foot.

Capital Improvements: This cost will include the replacement and upgrading of the facility chosen for The Excel Center.

Operating Leases: This will cover the fee for the 2 printers at The Excel Center.

Insurance (Facility) – This will cover the cost of insuring the building chosen for The Excel Center.

Purchase of furniture, fixtures, and equipment: This cost will include replacing and upgrading the furniture, fixtures, and equipment at The Excel Center based on 10% of the initial cost.

Electric & Gas: Costs assume \$2000 per month based on other Excel Centers.

Water & Sewage: Costs assume \$1000 per month based on other Excel Centers.

Repair and Maintenance Services: This includes as estimate of hiring outside entities to make repairs to the school.

Custodial Services: This includes the cost of supplies as the custodian will be employed by The Excel Center.

Waste Disposal: This will cover the cost of the trash being transported by Wabash Valley Goodwill.

Security Services: This will include a fee for maintaining the security system at the school.

Other Expenses

Indiana Charter School Board Administrative Fee: This will cover the fees to the ICSB annually.

Other Expenses: This fee will be for licensing fees to GEI for the use of the name and the marks of The Excel Center.