# Quality Counts:
# Indiana Charter School Program Grant Application

2017-2018

## Applicant Entity: Goodwill Education Initiatives

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| Contact Person for Grant: Betsy Delgado | Title: Vice President of Mission and Education |
| Total Grant Funds Requested: (Up to $900,000): $900,000 | Total Project Period Months Requested (24-60 months): 40 |
| Application to:<br>Open Expand **X Replicate** | Expected Date School will Open, Expand, or Replicate: July 2018 |
| Charter Award Date (indicate if expected): April 27, 2017 | Charter Expiration Date: July 2023 |
| Proposed Charter School Address: The school will be located in Muncie, Indiana. We will determine the exact address in the next two months. | |
| Applicant Address (if different than proposed address): 1635 West Michigan Street; Indianapolis, Indiana 46222 | |
| Applicant Telephone: 317-524-4313 | Applicant Email: bdelgado@goodwillindy.org |
| **Fiscal Contact** | |
| Fiscal Manager: Lynn Greggs | Title: Director of Financial Operations |
| Telephone: 317-524-4313 | Email: lynn.greggs@goodwilleducation.org |

| Charter School Board Contact Information | |
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| 1. Board President: Claudia Cummings | 2. Email: ccummings@conexusindiana.org |
| 3. Board President Address: 111 Monument Circle, Suite 1800; Indianapolis, Indiana 46204 | |

| Authorizer Contact Information | |
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| 1. Authorizing Agency: Indiana Charter School Board | 2. Authorizing agency contact person: James Betley |
| 3. Authorizing agency contact telephone: 317-232-7585 | 4. Authorizing agency contact email: jbetley@icsb.in.gov |
| 5. Authorizing agency address: Indiana Charter School Board; 143 West Market Street, Suite 400; Indianapolis, Indiana 46204 | |

**20 U.S.C. § 5203(d)(3)** requires all Charter School Program (CSP) grant applications must be provided to the charter school authorizer and the authorizer must verify that the CSP applicant charter school has notified them of application submission. The signature by the designated official form the charter school authorizer signifies that this requirement has been met.

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| James Betley | Executive Director |
| Authorizer Official Printed Name | Title |
| | 01/24/18 |
| Signature | Date |

## Assurances

Each participating subgrant recipient does hereby agree to comply with the following assurances (mark each with an X):

_X_ 1. Subgrant funds will be expended during the specified grant period; standard accounting procedures will be utilized by subgrant recipients and records of all subgrant expenditures will be maintained in an accurate, thorough, and complete manner.

_X_ 2. Subgrant recipients confirm their understanding that funds for implementation activities will be awarded only if they are an open and operating school or have submitted an application to a charter school authorizer and plan to open with 18 months.

_X_ 3. Subgrant recipients will participate in all data reporting and evaluation activities as requested or required by the U.S. Department of Education, the Indiana Department of Education (IDOE), and Indiana Code, including on-site and desktop monitoring conducted by the Indiana Department of Education, annual, independent audits required by the state board of accounts that are publicly reported and include financial statements prepared with generally accepted accounting principles, annual reports, and a final expenditure report for the use of subgrant funds. This section includes participation in any federal or state funded charter school research or evaluations. Failure to submit required information may result in a withholding of grant funds or a non-renewal of subsequent year funding within the project period.

_X_4. Subgrant recipients will expend implementation funds only for the purpose of implementation activities in a charter school which is nonsectarian in its programs, admissions, policies, employment practices, and all other operations, and which will be in compliance with all Indiana laws and administrative rules regarding staff certification and licensure.

_X_ 5. Subgrant recipients will comply with all federal laws including, but not limited to, the Age Discrimination 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 Uniform Grants Guidance (2 CFR § 200). This section requires each charter school to recruit, enroll, retain, and meet the needs of all enrolled students, including children with disabilities and English learners.

_X_ 6. Subgrant recipients will comply with all state and local laws and health and safety requirements applicable to Charter Schools, including but not limited to all laws related to student admissions and enrollment, non-discrimination, data reporting, compulsory student attendance, and accountability.

_X_ 7. Subgrant recipients will comply with all provisions of the Public Charter Schools Program of the U.S. Department of Education, including compliance with activities allowable for implementation funds. This section requires compliance with the Nonregulatory Guidance for CSP funds.

_X_ 8. Subgrant recipients ensure that the Charter School will receive funds through programs administered by the U.S. Department of Education under which funds are allocated on a formulary basis.

_X_ 9. Subgrant recipients shall include important information on the website of the school to help parents and the community to make informed decisions about the education options available to their children, including information on the educational program, student support services, parent contract requirements (including any financial obligations or fees and information regarding textbook assistance), and enrollment criteria. This section requires the school to provide annual performance and enrollment data for the student body and subgroups of students to the IDOE in order to display on its public database.

_X_ 10. It is the responsibility of each Charter School that receives funds under this grant to comply with all required federal assurances. Any Charter School that is deemed to be in noncompliance with federal or state statute and fails to address areas of noncompliance will not be funded. Funded schools will be expected to cooperate with the Indiana Department of Education in the development of certain reports to meet state and federal guidelines and requirements. Funded projects will be required to maintain appropriate fiscal and program records. Funded schools will be required to participate in desktop and on-site monitoring activities. If any findings of misuse of funds are discovered, project funds must be returned to the Indiana Department of Education. The IDOE may terminate a grant award upon thirty days' notice if it is deemed by the Indiana Department of Education that the school is not fulfilling the funded program as specified in the approved project or has not complied with the signed assurances.

I have read the above and agree to all terms and assurances.

Betsy Delgado

Signature of Project Contact

1/22/18

Date Signed

Claudia Cruz

Signature of Board President

1/22/18

Date Signed

| Grade Levels to be Served | | |
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| Year (of Grant Implementation) | Grade Levels | Projected Student Enrollment |
| First Year 2018-2019 | 9-12 | 300 |
| Second Year 2019-2020 | 9-12 | 300 |
| Third Year 2020-2021 | 9-12 | 300 |
| Fourth Year 2021-2022 | 9-12 | 300 |
| Fifth Year 2022-2023 | 9-12 | 300 |
| Maximum | 9-12 | 300 |

| Student Demographics<br>*indicate if actual or expected percentage of total student population*<br>Actual **X** **Expected** | | |
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| Free/Reduced Price Lunch: 70.3% | Special Education: 21.72% | English Learners: .97% |
| Black: 21.1% | Native Hawaiian or Other Pacific Islander: 0.1% | Hispanic: 4.6% |
| American Indian: 0.4% | Multiracial: 12.4% | Asian: 0.8% |
| White: 60.5% | Male: 53.5% | Female: 46.5% |

| Funding Requested | | |
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| | **Month/Year to Month/Year** | **Funding Requested by Year** |
| Planning (if applicable, prior to opening) | 3/1/2018 to 7/2018*<br>*Max 18 months | $300,000*<br>*Max $300,000 for planning year |
| Year 1 Implementation | 7/2018 to 7/2019 | $504,500 |
| Year 2 Implementation | 7/2019 to 7/2020 | $79,500 |
| Year 3 Implementation (if applicable) | 7/2020 to 7/2021 | $16,000 |
| Year 4 Implementation (if applicable) | to *<br>*May not extend beyond 9/30/22 | N/A |
| Year 5 (if applicable, do not utilize this row if utilizing the planning period) | to *<br>*May not extend beyond 9/30/22 | N/A |
| Total (max 5 years, planning + implementation) | | $900,000*<br>Max $900,000 |

| Charter School Program Areas Contacts | |
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| Students with Disabilities: | Contact Name: Laura Cope<br>Email: laura.cope@goodwilleducation.org<br>Phone Number: 317-524-3843 |
| English Learners (including Title III): | Contact Name: Laura Cope<br>Email: laura.cope@goodwilleducation.org<br>Phone Number: 317-524-3843 |
| Title I, Part A: | Contact Name: Laura Cope<br>Email: laura.cope@goodwilleducation.org<br>Phone Number: 317-524-3843 |
| Title II, Part A: | Contact Name: Laura Cope<br>Email: laura.cope@goodwilleducation.org<br>Phone Number: 317-524-3843 |

| Management Organization Information |
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| Will the school work with a charter or educational management organization?<br>Yes **X No**<br><br>If no, skip to the next page. |
| If yes, name the management organization:<br>Employer Identification Number (EIN): |
| Is the management organization: For Profit Not for Profit |
| Employees of the school will be: Employed by the school<br><br>Employed by the management organization |
| Note about management organizations:<br><br>Charter School Program (CSP) grants are made to charter schools, not any other entity. Regardless of the charter school's relationship with a management organization, the charter school and board retain responsibility for the all aspects of the grant including, but not limited to application submission, budget decisions, and repayment of any misspent funds. Items purchased by the school with CSP funds are and remain the property of the school, not the management organization.<br><br>Grant applications and budgets may not include any management fees that the school incurs as part of the management contract but may pay for allowable activities carried out by the school or the management organization. |

If applicable, the full contract or agreement with the charter management organization (CMO) or educational management organization (EMO) must be included with this application to ensure it meets the definition of arm's length requirements. In order to be considered eligible, the school must demonstrate that the CMO or EMO has no involvement with the administration of the subgrant. The following factors will be considered:

a) Whether the charter school's governing board is selected by, or includes members who are employees of the CMO or EMO;
b) Whether the charter school has an independent attorney, accountant, and audit firm that works for the charter school and not for the CMO or EMO;
c) Whether the contract between the charter school and the CMO or EMO was negotiated at "arms-length," clearly describes each party's rights and responsibilities, and specifics reasonable and feasible terms under which either party may terminate the contract (e.g., the charter does not lose the right to use the facilities)
d) Whether the fee paid by the charter school to the CMO or EMO is reasonable for the type of management services provided; and
e) Whether any other agreements (e.g., loans, leases, etc.) between the charter school and the CMO or EMO are fair and reasonable, documented appropriately, align with market rates, and include terms that will not change if the management contract is terminated.

As a general matter, subgrantees must avoid apparent and actual conflicts of interest when administering grants. For additional information on conflicts of interest, please see Section G of the federal CSP Nonregulatory Guidance.

| **Optional Elements: Competitive Preference Priorities (up to 3 additional points)**<br><br>Applications that address early childhood programs, postsecondary education, or rural area locations will receive preference points when applications are scored. | | |
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| Element | Addressed within Charter Application (cite page and paragraph/section # or mark N/A and address in next column or additional pages) | Additional Information (may attach additional pages if necessary, cite specific corresponding element number)<br><br>Note: 2 page limit for optional elements if attaching additional pages. |
| CPP1: Provide an overview of the early childhood, postsecondary, or rural area model and the expected targets and outcomes targeted at these unique populations<br><br>Indicate areas of focus<br><br>Early Childhood<br>X **Postsecondary**<br>Rural Areas | Page 49: Starting with "Postsecondary Education and Career Pathways" (3 paragraphs) | Goal: Students who graduate from The Excel Center will demonstrate the ability to succeed in post-secondary environments.<br><br>Measure: At least 80% of The Excel Center graduates will graduate having either earned a college credit or an industry certification. |

## Required Elements

In order to streamline the application process and to ensure that the application does not duplicate efforts from the charter application to the charter school authorizer, the entity may state where the information regarding the below elements are already available within the charter application. However, if the eligible applicant needs to expand or more succinctly state the charter application in order to attend to all elements for the CSP grant application, then utilize the provided space within the application or attach additional pages.

| Element | Addressed within Charter Application (cite page and paragraph/section # or mark N/A and address in next column or additional pages) | Additional Information (may attach additional pages if necessary, cite specific corresponding element number)<br><br>Note: 30 page limit for required elements if attaching additional pages. Page limit does not include the budget. |
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1. Provide an overview of the project, including the **vision of the charter school** and expected outcomes aided by the CSP funds.

Goodwill Education Initiatives, Inc. (GEI) is proposing to replicate by opening a new Excel Center campus in Muncie, Indiana. The mission of the Excel Center is to provide adults the opportunity and support to earn a high school diploma and begin post-secondary education while developing career paths in sectors of the local economy that offer better-than-average employment and growth opportunities. The school will "meet students where they are" in their education by providing a flexible structure and supportive relationships to help them manage work, life, and family concerns as they achieve their educational goals.

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

GEI opened the first Excel Center in Indianapolis in 2010 and now successfully operates twelve Excel Centers across central and southern Indiana. The Excel Center's results since its opening – and the continued demand for a school in other communities – suggests that further expansion of the Excel Center will lead to reaching more students and increasing the overall educational attainment in cities across Indiana. CSP funds will help the Excel Center allow more students to have stable, convenient access to an educational model designed around the unique needs of adults who have dropped out of school. The outcomes we expect to achieve, aided by CSP funds are:

- The Excel Center will enable students who have dropped out of school or who are at risk of dropping out to earn a high school diploma.
- Students at the Excel Center will meet the same rigorous standards for achievement and high school graduation as students in a traditional high school setting.
- Students who graduate from the Excel Center will demonstrate the ability to succeed in post-secondary academic environments.

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| 1a) Describe the vision of the charter school. | N/A | The vision of GEI, through the Excel Center, is to deliver on the mission of GCSI: to change lives by empowering people to increase their independence and reach their potential through education, health, and employment. The Excel Centers desire to bring about hope and economic opportunity to communities, families, and individuals. Through the power of education, its goal is to set people on a pathway towards better career prospects that lead to economic self-sufficiency and breaking the cycle of poverty. |

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| 1b) Describe the particular need for the school within the specific community, and how the community will be informed about the charter school. | Page 35-36 "Community Engagement" (4 paragraphs)<br><br>Page 70 "Student Recruitment and Marketing" (2 paragraphs w/ bullets)<br><br>Page 72: "Sufficient Demand" (2 paragraphs w/ table) | |

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| 1c) Describe the curriculum framework to be used in the school, including the key instructional practices and the research base that guides curriculum development. | Page 47-49: "Curriculum and Instructional Design" (6 paragraphs, large visual)<br><br>Page 50-52: "Evidence-based Support" (11 paragraphs and bullet list)<br><br>Pages 52-54: "Instructional Strategies" (8 paragraphs) | |
| 1d) Describe the specific ways in which the educational program will be innovative, unique, and enable all students, including students with disabilities and English learners, to meet or exceed Indiana's challenging academic standards. | Pages 47: "Innovation" (1 paragraph)<br><br>Pages 62 – 70: "Special Populations and At-Risk Students" (all paragraphs and lists) | Please also note the innovative curriculum model described in the previous section. |

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| 1e) Describe how the school will developed 21st century skills or prepare students to be college and career ready in future postsecondary and workplace environments. | Page 54: "Pupil Performance Standards" (first paragraph)<br><br>Page 56: (2nd paragraph/bullets - fourth paragraph)<br><br>Pages 58-59: "School Culture" (7 paragraphs) | |
| 1f) Describe how the school will sustain activities when CSP funds are no longer needed (use to inform your sustainability budget year) | N/A | Similar to the other Excel Centers within GEI's network, the student enrollment number for the school model is intended to create a solid educational structure and financially self-sustaining model. After the grant funds are fully expended, school directors will work directly with GEI's finance team to ensure professional development and other activities supported by CSP funds are included in the school's budget for subsequent years. We are purposefully planning to use the majority of the CSP funds for school start-up activities and therefore only a small portion of the CSP supported activities will need to continue long-term. |

| 2. Provide an overview of the **expertise of the charter school developer(s)** to open, replicate, or expand the high-quality charter school.<br><br>GEI, with the support of GCSI, has significant resources that can be used to replicate the Excel Center. GEI has rapidly grown the Excel Center in an effort to meet the demand of adults who desire to continue their education. The Excel Center has grown from one location with 300 students in 2010 to twelve campuses with nearly 3,500 students in 2017. During that time, the Excel Center's staff has increased from 20 to approximately 250 fulltime staff and GEI's central office staff has increased to more than 40 individuals. This growth is in large part due to GEI and GCSI's collection of skills, experience, and talents, as well as growth plans that are supported by highly-capable leaders. | | |
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| 2a) Identify the key personnel involved in the development and describe their previous experience. | Pages 39-42 "Governance" (20 paragraphs)<br><br>Page:90-136 "Resumes listed as Attachment 1" | Note: Jeff Curiel is no longer with GEI. (paragraph 14).<br>Lynn Greggs is the Director of Financial Operations. In her role, she supervises all accounting and financial activities for GEI's 12 schools and other financial activities. Lynn has 11 years of public accounting experience with an emphasis on nonprofits and five years of experience in education administration. She joined the Goodwill team in 2017. She earned her B.S. in Accounting from Butler University. Lynn's responsibilities include developing the budget for each school with school leadership, grant oversight, and maintaining GEI's long-term financial sustainability. |

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| 2b) If selecting to replicate or expand a high-quality school, provide data and analysis that clearly demonstrates the model replication or expansion will deliver strong academic growth and student achievement while displaying no significant issues in operational management (student safety, school finance, or statutory/regulatory compliance) The analysis must reference the school's Annual Performance Report found on DOE Compass (or a similar report if not an existing Indiana model). | Pages 87-89: "Network Level Performance" (All paragraphs and charts) | The Excel Center is an adult high school model so we will reference our 2017 Adult High School Grade Calculation (per 511 Indiana Administrative Code 6.3). Please see the attached chart detailing the school grade, Graduation Calculation Score, and College & Career Readiness Score for each individual charter. All of our charters have earned an A or B rating and gotten 100 for the College & Career Readiness Score for the past two years. |
| 3. Provide an overview of the **charter school goals**.<br><br>To support student progress, the Excel Center will create a supportive environment that promotes flexible and individualized learning while adult learners manage the various demands and challenges of work and life. GEI anticipates that the Excel Center Muncie will be held to the same performance standards as all other GEI-operated Excel Centers in ICSB's portfolio. The anticipated student population faces significant academic and non-academic challenges. School-specific goals mirror the particular challenges of working with this target population. Due to the uniqueness of The Excel Center model, the Indiana State Board of Education (SBOE) has approved alternative accountability metrics in order to hold the Excel Center accountable to high-performance standards. | | |

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| 3a) Describe 3-5 specific, measurable goals to address the academic outcomes of all students that specifically related to activities within the *Quality Counts* CSP grant and the methods for which the goals will be measured. This must include student achievement data from the state content assessment. | Page 76: "Academic Performance Goal" (table) | CSP funds will be used to help reach these goals in several ways:<br>• Providing professional development for key staff to support students in achieving their academic goals.<br>• Ensuring the facility is appropriate for the Excel Center's instructional model and has the necessary technology infrastructure.<br>• Allowing enhanced support from the GEI central office throughout the first and second year of implementation. |
| 3b) Describe how the school will ensure all stakeholders, including staff, students, and community are aware of the school's goals. | Page 43: "Advisory Bodies" (6 paragraphs) | The Excel Center will ensure communication of goals with staff through professional development and regular staff meetings.<br>Students will attend school orientation (iExcel) where goals will be clearly communicated. Goals will also be routinely reviewed and discussed in classrooms and at the individual-level by students' life coaches.<br>Goals will be shared with the community through the Excel Center's advisory groups – described on page 5 of our Charter Application. These groups will help inform school decisions and keep the school closely linked to the broader Muncie community. |

4) Provide an overview of how the charter school expects to accomplish the goals stated in section 3 with the **use of the CSP funding**.

One of the most important aspects of the Excel Center model is our staff and several of the positions we require need more direct training that is not available outside of GEI. CSP funds will allow us to hire, train, and professionally develop our Instructors, Coaches, Manager of Office Administration, School Director, and others, prior to opening our doors. This ensures every student who walks into the Excel Center receives the highest level of service we can provide. A well-prepared staff will be better able to help students earn their high school diploma, meet Indiana's rigorous academic standards, and teach the skills needed to succeed in post-secondary academic environments. CSP funds will be used to ensure the Excel Center Muncie completes all the school opening activities and therefore is ready to provide robust support to students.

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| 4a) Provide a budget narrative to address each budgeted line item to demonstrate alignment between the grant goals and proposed expenditures. | Please see the attached budget | • Personnel/Fringe Benefits: CSP grant funds will allow us to hire key staff prior to the opening of our school to ensure they are well prepared to serve students as soon as we open.<br>• Travel: Key staff will be able to travel to professional development training and the GEI central office will be able to provide significant on-site support throughout the first three years of implementation.<br>• Property & Equipment: CSP grant funds will help ensure the facility has the technology infrastructure, proper equipment, and furniture needed to successfully implement the Excel Center model. |
| 4b) Describe how each cost is reasonable, allocable, and necessary in light of the project goals. | N/A | These costs are reasonable, allocable, and necessary for the Excel Center Muncie to reach its goals. We developed our budget based on comparable costs when we have opened prior Excel Centers. In order to ensure the Excel Center will enable students who have dropped out or who are at risk of dropping out to earn a high school diploma and succeed in post-secondary academic environments, we need staff who are well prepared to serve our students. We also need a facility that has the technology functions necessary for our curriculum and instructional model. During the first two years of implementation, we need our central office to be able to make on-site visits to provide support to the School Director and any other staff member who is new to the Excel Center model. |

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| 4c) Describe how the school will develop the required capacity to continue implementation and operation in a high-quality manner after the grant expires | N/A | With the support of our central office, the Excel Center Muncie will develop the capacity to continue implementation after the CSP grant expires. A strong central office is a critical component of the success of existing Excel Centers and is especially important to the success of any new Excel Center. Since GEI opened its first school in 2004, it has grown to include expertise in the following areas: accounting and bookkeeping; payroll; curriculum and curriculum development; data analytics; data collection and state reporting; development; and registrar. In addition to providing administrative services, GEI's central office staff is actively involved in state and local policy-making decisions, ensuring that the needs of The Excel Center are being heard by state and local officials. GEI's central office staff provides high-level support for all school support functions, allowing school staff the time and flexibility to focus on their key objective: student success. |
| 5) Provide an overview of the charter **school governance plan and administrative relationships**. | | GEI will hold the charter for The Excel Center Muncie and be its sole governing authority. |
| 5a) Describe the governance structure of the school, including any partnerships with Educational Management Organizations (EMOs) or Charter Management Organizations (CMOS) and why they were selected. | Pages 42-46: "Governance Structure" (23 paragraphs and bullets)<br><br>Org chart Attachment 14 (page 249-253) | The GEI Board of Directors does not intend to contract with an Education Service Provider for school management or school related-services. As the largest charter school network in Indiana, GEI has developed a robust administrative central office that supports all functions of the schools it operates. |

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| 5b) Describe how the school operates by explaining how the charter school leaders are empowered to make daily decisions, and how staff within the school organization work together. | Attachment 4 (Page 159-162) "Governance and Operational Structure" | As outlined in the Governance Structure section of our charter application, School Directors have a high level of autonomy for hiring their staff and overseeing day-to-day operations. The GEI central office provides each director support for implementing the Excel Center model and creating their individual school budget. The School Director role is similar to a principal in a traditional school district. Staff at each Excel Center work together to ensure student's success. Coaches, who help students address their non-academic life challenges and help create school schedules are constantly communicating with teachers to ensure students are receiving consistent, unified support. The School Director will meet periodically with other school directors for data reviews, which allow directors to address challenges, solicit peer feedback, and learn best practices. The Excel Center network also offers monthly peer-learning meetings for Instructors, Coaches, Teachers of Record, and Site Test Coordinators. The Excel Center Muncie will not only have the support of the central office staff and Muncie Community, but also the entire Excel Center network. |
| 5c) Describe the process to select board members. | N/A | Members of GEI's Board of Directors are selected by the Governance Committee of the board. This Committee comprises three GEI Board members and the CEO of GCSI. As the need for new members arises, the Governance Committee solicits members of the board for suggestions for prospective members. Care is taken to always have board members with expertise in the areas of finance, education, law, and business along with strong community ties. Prospective members are vetted against those categories, with candidates selected to meet with the committee to explore their willingness to serve along with more fully understanding their approach to governance. Candidates are then presented to the full Board for approval. |

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| 5d) Describe the governance training for board members, current and prospective. | N/A | Each board member receives extensive governance training from the CEO of GCSI and the Vice President of Mission and Education. The training covers the different aspects of serving on the GEI Board including the history of the schools, the expectations, and an overview of the progress of each school. Additionally, the Board Chair meets with new members and provides training on how the board functions. The Board Chair also leads an annual retreat for continued governance training. |
| 5e) If applicable, describe the relationship between the charter school leadership, governing board, or authorizer with the chosen service providers to ensure no apparent or real conflict of interest would be involved, per (EDGAR) § 74.42.<br><br>Please indicate "N/A" if no service provider is utilized. | N/A | Each GEI Board member signs a conflict of interest clause prior to joining the board and this is reviewed annually and must be shared with our charter authorizer. |
| 5g) Describe how the charter school will ensure timely and accurate data submission for state and federal reporting requirements. | N/A | GEI has more than ten years of experience complying with state and federal reporting requirements. We employ dedicated reporting specialists for submission of all student-level data to the Department of Education, through the STN website. The Excel Center Muncie will leverage GEI's experience and expertise to assist with complying with all federal and state reporting requirements. Student data will be collected daily through the school's student information system. As IDOE reports are due, the specialists will run reports from the school's student information system and work with school-level personnel to resolve any data issues. This process ensures accurate and timely data submission. |

6) Provide an overview of the **student recruitment and admissions 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 older
• 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 relatively 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 an Excel Center's active database in the school's student information system upon meeting particular criteria described below.
2. Withdrawn Student: A student transferred from being enrolled in the active database within the school's student information system to inactive status, based on meeting particular criteria described in our withdrawal policy.
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 an online class by logging in to the designated online student coursework tracking system.

There are minimal requirements that must be met in order to be admitted to 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.

The Excel Center will be assisted by the marketing staff of GCSI in the development and execution of the school's marketing plan and the Excel Center staff will be responsible for student recruitment for the school.

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| 6a) Describe the school's recruitment plan, and compliance with Indiana Code 20-24-5. | Page 202: Attachment 9 – Enrollment Policy, paragraph 2 | Recruitment for the Excel Center Muncie will happen through multiple channels:<br><br>• *Outreach to current and prospective partner organizations.* Several meetings have been held to fully explain the aim of The Excel Center, its target student population and to seek alignment agreements with partners in education and workforce development, and the public and social services sectors. Information about The Excel Center will be shared with a broader number of organizations throughout targeted communities that work with populations that are unschooled and/or unemployed or underemployed. These partners are often key student referral channels.<br>• *News media releases.* Information announcing new Excel Center sites will be released via local media and on The Excel Center's website.<br>• *Public information meetings.* To supplement other tactics, a number of neighborhood-based informational meetings will be announced and held. This will allow direct interaction with prospective students and allow them to meet staff, ask questions and pick up enrollment application materials. Target locations for public information meetings will include public libraries and community centers.<br>• *New website development.* GCSI will provide information on The Excel Center's website. The website will include academic program descriptions, enrollment information, application forms and frequently asked questions.<br>• *Social media.* Facebook, Twitter, and email blasts will be utilized to disseminate information about The Excel Center and upcoming events.<br>• *Word of mouth.* Since its inception in 2010, strong word of mouth has been the most successful recruitment tool for recruiting student applicants at The Excel Centers. Once individuals began to hear about The Excel Center, interest grew rapidly. |

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| 6b) Describe the public lottery process that will be conducted when more students apply than be accommodated. | Page 203: "Lottery" | |
| 7. Provide an overview of how the charter school will **meet the needs of educationally disadvantaged students**.<br><br>The Excel Center's unique curricular format provides ample support for special student populations, including students with identified disabilities under the Individuals with Disabilities Education Act (IDEA), students with Section 504 plans under the Americans with Disabilities Act (ADA), English Language Learners (ELL) students, intellectually gifted students, and at-risk students performing well below grade level. | | |
| 7a) Describe how the school will comply with state and federal law to deliver appropriate services to meet the needs of students with disabilities, low-income students, English learners, homeless, and neglected & delinquent students. | Pages 62 – 70 "Special Populations and At-Risk Students" (all paragraphs and lists) | |

8. Provide an overview of the **community outreach activities.**

GEI has begun extensive community outreach to engage with community partners, business leaders, and educational institutions to explain the goals of The Excel Center model. The Excel Center and GEI have working relationships with a number of partner organizations that are critical to the success of the school. Chief among those partnerships is GEI's parent organization, GCSI.

GCSI has working relationships with a number of partner organizations that are critical to The Excel Center. GCSI is a strong organization throughout all of the communities it serves, which includes all proposed school locations within this charter application. As the statewide community college network, Ivy Tech Community College is the school's primary educational partner. The Excel Center will build on Ivy Tech's dual credit course offerings for high school students. In the dual credit arrangement, an Excel Center student is dual-enrolled as both an Excel Center and an Ivy Tech student, and completion of an Ivy Tech course grants both high school and postsecondary credit. The Excel Center will pay the tuition costs for the Excel Center students to take Ivy Tech courses.

To date, the Excel Center has made significant strides in engaging with stakeholders in bringing the Excel Center to new communities. In addition to the Excel Center having much support from state legislators, community interest in the Excel Center has grown through conversations with local leaders as members of the applicant team have shared its success. GEI staff have held meetings with Muncie Community Schools, the Mayor of Muncie, the Muncie Housing Authority, Muncie NAACP, and a number of individuals that represent organizations such as the BY5 Coalition and the United Way of Delaware County.

Several other community partners have established working relationships with GEI to support and supplement services made available to students. These relationships increase GEI's ability to respond to the needs of its students by accessing the resources and experience of community partners to remove the barriers that would otherwise prevent students from re-engaging in their education and, in many cases, led students to dropping out of school in the first place. GEI plans to continue its community engagement and outreach efforts prior to and after charter approval.

| | | |
|---|---|---|
| 8a) Describe how parents and the community are involved in the planning and design of the charter school | Page 72: "Parent Engagement" (3 paragraphs)<br><br>Page 73: "Community Support" (5 paragraphs) | |
| 9. Provide an overview of the **fiscal management plan.**<br><br>GEI follows Generally Accepted Accounting Principles (GAAP) and State Board of Accounts requirements in all accounting practices for its schools. Day-to-day financial management is provided by GEI's Director of Financial Operations, who also acts as the assistant treasurer for GEI's Board of Directors. The Director of Financial Operations will be assisted and supported by the Chief Financial Officer of GCSI, who is also the Board treasurer of GEI. Payroll is managed by GEI staff for all of its employees. Excel Centers, LLC and Indianapolis Metropolitan High School, LLC are audited on an annual basis, and consolidated GEI financial operations are included with GCSI's annual audit process. GEI contracts with Greenwalt CPAs as its independent auditor to conduct the annual audits of all of its schools.<br><br>Budget development is an iterative process that will incorporate input from key stakeholders. The annual budget will be developed each year by GEI's Director of Financial Operations and the School Director with assistance from the Senior Director of The Excel Center and Operations, the Vice President of Mission and Education Initiatives, and GCSI's Chief Financial Officer. The budget will be presented to the GEI Board for review, modified as it deems necessary, and adopted. In addition, the Goodwill Foundation may solicit other private grants and donations to support the operation and development of the school. All of GEI's schools are in a strong financial position and are in good fiscal health. | | |
| 9a) Describe the internal controls over expenditures and how records will be maintained | N/A | GEI institutes rigorous internal financial controls to ensure the following:<br>• Proper segregation of duties;<br>• Authorization and Processing of Disbursements (all disbursements properly authorized and processed in accordance with established policies and procedures); and<br>• Banking Arrangements/Reconciliation (GEI maintains bank accounts in federally insured, nonspeculative, commercial bank or credit union accounts). |

| | | |
|---|---|---|
| 9b) Describe the process for managing this particular grant, including decision-making process, creation of the budget, and how items purchased are tracked. Schools working with an external provider must affirm that the charter school leaders are responsible for all aspects of the grant management. | N/A | GEI will manage the CSP grant. At all times, the GEI Board will be responsible for all aspects of CSP grant management and will be supported by the finance and management teams of Goodwill and GEI. The proposed CSP budget was developed by GEI staff and approved by GEI's Board of Directors. As indicated in the budget, most of the proposed CSP grant expenditures will be directed toward the acquisition of The Excel Center's leadership team during the pre-opening period and preparing the facility. Any product or service expenditures made possible by the CSP grant will be executed following appropriate bidding and shopping to enable The Excel Center to make the most of the CSP grant funds. Every request for purchase will flow through GEI's accounting department and every purchase must have approval from the School Director. |
| 9c) Describe how other state and federal funds will support the effective operation of the school or student achievement, including paying for staff and other related costs beyond initial startup costs support by the CSP grant | N/A | The Excel Center has been designed to be sustainable solely on state funding following the expiration of the grant period. At the end of this grant period, we will rely on our Adult Learner funding and other state and federal grants for which we are eligible, to pay staff, offer professional development opportunities, and purchase any equipment needed for the facility. In order to prepare for these costs, we have reduced the amount spent on personnel, facilities, and travel each year of our CSP grant implementation. |

| | | |
|---|---|---|
| 10. Provide an overview of the **facilities** to ensure they are safe, secure, and sustainable.<br><br>The safety and security of students, staff, the facility, and all school property is a top priority for Excel Centers, and school leadership will take every step necessary to ensure that students and staff are prepared for any foreseen or unforeseen emergency, disaster, or threat. As required by law, the Excel Center will participate in mandatory fire, tornado, and lockdown drills.<br><br>Each school will have a full-time security officer who will monitor the entrance and scan active security camera feeds located throughout the school. The Excel Center will employ both an employee- and student acceptable use policy concerning technology and internet use, which will be communicated in the staff and student handbooks. The purpose of school-provided Internet access is to facilitate communications in support of research and education, and the acceptable use of electronic resources will be monitored by staff.<br><br>Furthermore, GCSI has developed its Safety, Loss Prevention and Security department to manage security and safety in its facilities. Each location is regularly audited for compliance with applicable safety, including, inventory management, labor reporting/payroll, and back-office processing policies and procedures. The Excel Centers also have a high-resolution digital security camera system in operation in many locations. The Excel Center Muncie will install a camera system as a tool to deter theft, misappropriation, and misbehavior. GCSI and GEI staff work actively with the insurance agents and carriers for risk assessments, audits, training, policy reviews, additions and deletions to listed coverage, and for business development practices. | | |
| 10a) Describe the school's facility plan, including how the student enrollment and other available funding will meet the facility needs | Page 85-86: "Facility Plan" (6 paragraphs) | |
| 10b) Describe how the charter school has considered the transportation needs of the school's students and provide an overview of the transportation plan | Page 84-85: "Transportation" (3 paragraphs) | |

| Required Appendices | |
|---|---|
| A) Charter Application to Authorizer (New, Replication) or Amendment to Existing Charter (Expansion) | Yes X Page 30-405 |
| B) Budget Form/Narrative (use required form) | Yes X |
| C) 2016-2017 Expanded Annual Performance Report (if applicable) or most recent<br>*Found at compass.doe.in.gov > Accountability > Annual Performance Report* | Yes X Page 407-440 |
| D) Proof of non-profit status of the governing board of the charter school or proof that the application for such status has been made | Yes X Page 216-221 |
| E) Enrollment or student admissions policy | Yes X Page 202-204 |
| F) Agreement or contract between the charter school governing body and the management organization (if applicable) | Yes _____<br>N/A____X____ |
| G) School's discipline policy. Statute requires discipline policies that promote retention and reduce the overuse of discipline practices that remove students from the classroom | Yes X Page 205-209 |

# The Excel Center®

## GOODWILL

*A charter proposed by:*

**Goodwill Education Initiatives, Inc.**

*And supported by:*

**Goodwill Industries of Central and Southern Indiana, Inc.**

*Presented to:*

**Indiana Charter School Board**

March 2017

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Exhibit B

## Proposal Overview

The applicant group's **designated representative** will serve as the contact for all communications, interviews, and notices from the ICSB regarding the submitted application.

***IMPORTANT NOTE:*** *The full application, including this form, will be posted on the ICSB website. Applicants are advised that local community members, including members of the media, may contact the designated representative for questions about the proposed school(s).*

**Name of proposed Charter School:** The Excel Center

**Proposed Charter School location:***

Muncie, Marion, Columbus, and Bloomington

**Please indicate the city/town and, if known, potential address or neighborhood of the school location. Virtual operators should indicate the relevant geographies the operator intends to serve.*

**School district of proposed location:** Muncie Community Schools (Muncie); Marion Community Schools (Marion); Bartholomew Consolidated Schools (Columbus); Monroe County Community Schools (Bloomington)

**Legal name of group applying for Charter:** Goodwill Education Initiatives, Inc.

**Designated representative:** Betsy Delgado, Vice President of Mission and Education Initiatives

**Contact Information (Phone & Email):** (317) 524-4380 bdelgado@goodwillindy.org

**Planned opening year for the school:** 2018-19 for first school

**Model or focus of proposed school:**
(e.g., arts, college prep, dual-language, etc.) Adult high school

**Proposed Grade Levels and Student Enrollment**

Indicate the grade levels the school intends to serve. Specify both the planned and maximum number of enrolled students by grade level for each year.

| Academic Year | Grade Levels | Student Enrollment (Planned/Maximum) |
|---|---|---|
| Year 1 | 9-12 | 300 (per school) |
| Year 2 | 9-12 | 600 (total for 2 schools) |
| Year 3 | 9-12 | 900 (total for 3 schools) |
| Year 4 | 9-12 | 1,200 (total for 4 schools) |
| Year 5 | 9-12 | 1,200 (total for 4 schools) |
| At Capacity | 9-12 | 1,200 (total for 4 schools) |

**Target student population** (if any): Adults who previously dropped out of high school

**Will an application for the same charter school be submitted to another authorizer in the near future?**
Yes ☐ No ■

**If yes, identify the authorizer(s):** n/a

**Planned submission date(s):** n/a

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

**Authorizer(s):** ICSB – 1 charter applications for 6 schools
Indianapolis Mayor's Office – 2 charter applications for 2 schools

**Submission date(s):** ICSB – fall 2012
Indianapolis Mayor's Office – spring 2013; spring 2015

For Experienced Operator Applications:

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

If Yes, please provide the following information:

**Identify the ESP or partner organization.** n/a

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

If yes, provide the name and location of at least one school where the model is in use. The Excel Center - Anderson

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

Indianapolis Mayor's office, Office of Education Innovation – (317) 327-3601
Indiana Charter School Board

**Signature of Applicant's Designated Representative**

Signature 3/20/2017 Date

## Executive Summary

Through this charter application, Goodwill Education Initiatives, Inc. (GEI) is proposing to open and operate four adult high schools throughout Goodwill of Central and Southern Indiana Inc.'s (GCSI) territory. The projected locations of these schools (The Excel Center®) include: Muncie, Marion, Columbus, and Bloomington. GEI is proposing to open The Excel Center in Muncie, Indiana in fall 2018 and open the remaining schools within the following four successive years.

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

The vision of GEI, through The Excel Center, is to deliver on the mission of Goodwill: to change lives by empowering people to increase their independence and reach their potential through education, health, and employment. The Excel Center brings about hope and economic opportunity to communities, families, and individuals. Through the power of education, GEI's goal is to set people on a pathway towards better career prospects that lead to economic self-sufficiency and breaking the cycle of poverty.

**Education Need and Target Population.** GEI opened the first Excel Center in Indianapolis in 2010 and now successfully operates eleven Excel Centers across Central Indiana. The Excel Center's results since its opening – and the continued demand for a school in other communities – suggests that further expansion of The Excel Center will lead to reaching more students and increasing the overall educational attainment in cities across Central and Southern Indiana. The Excel Center will allow more students to have stable, convenient access to an educational model designed around the unique needs of adults who have dropped out of school. Across the state, there are over 700,000 Hoosiers over the age of 18 without a high school diploma. The Excel Center has the ability to offer a significant number of these individuals an opportunity to improve their educational attainment. To meet some of this demand, GEI is requesting four additional charters to reach more communities through The Excel Center model.

An individual who drops out of high school faces a number of challenges that affect his or her current well-being and future success. High school dropouts have worse health, lower incomes, and fewer job opportunities than the general population.[1] In addition, high school dropouts are more likely to be recipients of government welfare and are eight times more likely to be incarcerated than high school graduates.[2]

A report by Civic Enterprises (2006) suggests that "circumstances in students' lives and an inadequate response to those circumstances from the schools led to dropping out." As adults, 76% of dropouts would enroll in an adult high school if they could; 47% say that not having a diploma makes it hard to

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[1] Gouskova, E. & Stafford, F. (2005). Trends in household wealth dynamics, 2001-2003. Ann Arbor: Institute for Social Research, University of Michigan. Retrieved from http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03_Trends_in_household_01_03_July_05.pdf

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

find a good job. The report goes on to state that the `"dropout epidemic in the United States disproportionately affects young people who are low-income, minority, urban, single-parent children attending large, public high schools in the inner city... Dropouts are much more likely than their peers who graduate to be unemployed, living in poverty, receiving public assistance, in prison, on death row, unhealthy, divorced, and ultimately single parents with children who drop out from high school themselves."[3]

Each of the communities of Muncie, Marion, Columbus, and Bloomington has ample need for the educational opportunity The Excel Center provides. In each location, there are thousands of adults who lack a high school diploma, making them unprepared to build the skills needed to be competitive in the workforce and, in many cases, secure jobs that offer a livable wage and continued career growth. The Excel Center offers the opportunity for some of the more disadvantaged members of the local community to become skilled and productive members of the workforce. Even for students who desire to continue into postsecondary education, The Excel Center serves a unique role in building skills among its students so that they are prepared for the next stage in their continuing education.

According to the Alliance for Excellent Education, an additional 10,000 high school graduates in Indiana would increase the gross state product by $100 million dollars, add 800 new jobs, and increase state and local tax revenue by $4.4 million.[4] Increasing educational attainment among adults with few options in Muncie, Marion, Columbus, and Bloomington has the potential to increase economic growth in areas of the state that need it the most.

**Community Engagement.** GEI has begun extensive community outreach to engage with community partners, business leaders, and education institutions to explain the goals of The Excel Center model. The Excel Center and GEI have working relationships with a number of partner organizations that are critical to the success of the school. Chief among those partnerships is GEI's parent organization, GCSI. GCSI has working relationships with a number of partner organizations that are critical to The Excel Center. GCSI is a strong organization throughout all of the communities it serves, which includes all proposed school locations within this charter application.

As the statewide community college network, Ivy Tech Community College is the school's primary educational partner. The Excel Center will build on Ivy Tech's dual credit course offerings for high school students. In the dual credit arrangement, an Excel Center student is dual-enrolled as both an Excel Center and an Ivy Tech student, and completion of an Ivy Tech course grants both high school and postsecondary credit. The Excel Center will pay the tuition costs for The Excel Center students to take Ivy Tech courses.

To date, The Excel Center has made significant strides in engaging with stakeholders in bringing The Excel Center to new communities. In addition to The Excel Center having much support from state legislators, community interest in The Excel Center has grown through conversations with local leaders as members of the applicant team have shared its success. GEI staff have held meetings with Muncie

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[3] Bridgeland, J.M., Dilulio, J.J. & Morison, K.B. (March 2006). *The silent epidemic: Perspectives of high school dropouts*. Washington DC: Civic Enterprises, LLC. Retrieved from https://docs.gatesfoundation.org/Documents/TheSilentEpidemic3-06Final.pdf

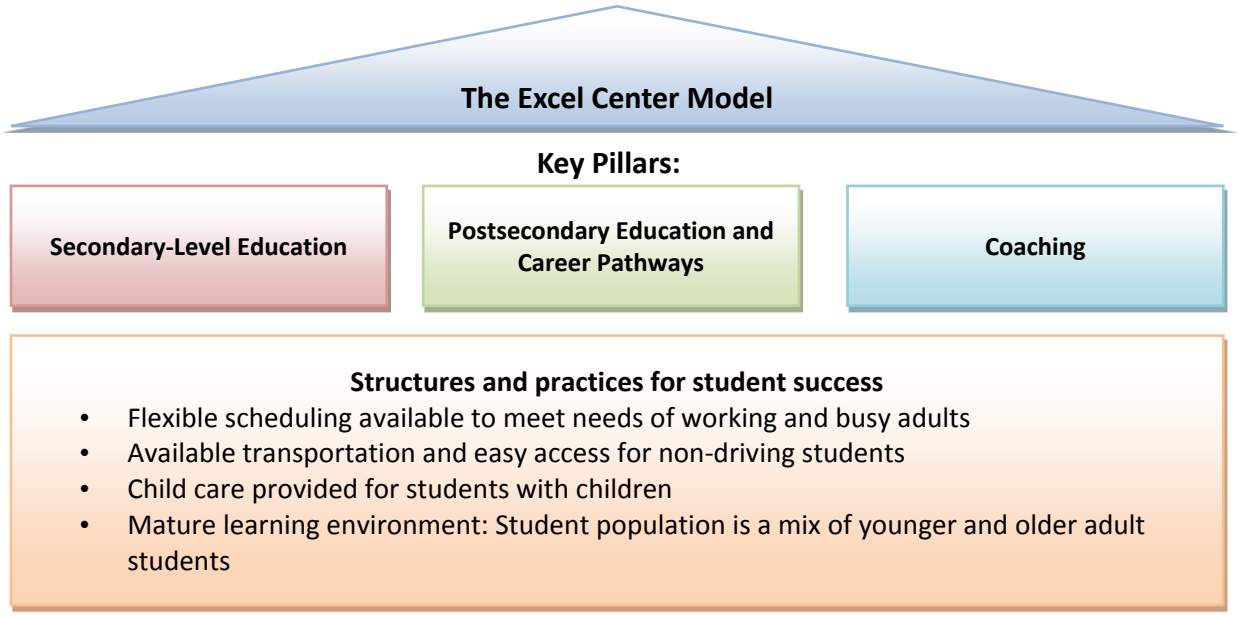
[4] Alliance for Excellent Education (2013). T*he economic benefits of increasing the high school graduation rate for public school students in Indiana.* Retrieved from http://impact.all4ed.org/wp-content/uploads/2015/09/IN_2015.pdf

Community Schools, the Mayor of Muncie, the Muncie Housing Authority, Muncie NAACP, and a number of individuals that represent organizations such as the BY5 Coalition and the United Way of Delaware County.

Several other community partners have established working relationships with GEI to support and supplement services made available to students. These relationships increase GEI's ability to respond to the needs of its students by accessing the resources and experience of community partners to remove the barriers that would otherwise prevent students from reengaging in their education and, in many cases, led students to dropping out of school in the first place. GEI plans to continue its community engagement and outreach efforts prior to and after charter approval.

**Education Plan/School Design**

The Excel Center will "meet students where they are" in their education by providing a flexible structure and supportive relationships to help them manage work, life, and family concerns as they achieve their educational goals. The Excel Center'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 address barriers that impede students' continued educational success.




The Excel Center is a nationally proven school model founded by GSCI. To date, the model has expanded throughout Indiana as well into Texas, Tennessee, and Washington DC, with another planned school opening in Arkansas in fall 2017. To date, GEI's Excel Centers have produced 2,385 graduates with nearly 90% of all graduates earning an industry-recognized credential in sectors with above-average growth potential, or earning dual credit at the time of graduation. Student survey data indicate that 80% of graduates are either employed or in college immediately after leaving The Excel Center.

**Vision for Growth.** In its short history, The Excel Center has achieved strong results in helping adults gain a high school diploma and enter into postsecondary education and high-growth, in-demand jobs. Despite these positive results, there remain large numbers of individuals who lack a high school diploma, and they remain limited in their ability to continue their education, find a good job, and

continue to progress through their career. As previously stated, there are nearly 700,000 Hoosiers who lack a high school diploma. There are hundreds of thousands of Hoosiers who live too far away from The Excel Center's current locations to enroll in the school. As a result, the school has not begun to reach all of the existing demand in Indiana for adults to earn a high school diploma. Through this charter application, GEI intends to continue reaching that demand.

In addition to meeting its goals to enable individuals to earn a high school diploma and begin postsecondary education while developing career paths that offer greater employment and career growth opportunities, The Excel Center creates several other lasting benefits in a local community. The Excel Center serves as a feeder system for skills training programs that improve work readiness for individuals in particular geographic regions. By increasing the skill level of the local community, The Excel Center can increase the number of skilled workers in high-growth fields, making that area more attractive to potential business investment. In fact, an independent research study found that The Excel Center's graduates are creating a total benefit of $9,330 per student, and students who attended but did not graduate had a benefit of $835 per student.[5]

GEI plans to reach more adults and increase educational attainment in cities across GCSI's territory by opening four new Excel Center over the next five years. By adding more schools across Central and Southern Indiana, GEI will positively impact more communities and countless families and individuals. Many students who live long distances from existing Excel Centers are unable to easily access the school. By adding new locations in other cities, The Excel Center will allow hundreds more adults to have stable, convenient access to an educational model designed around the unique needs and situations of adults who have dropped out of school.

**Network Governance and Leadership.** GEI has rapidly grown The Excel Center in an effort to meet the demand of adults who desire to continue their education. The Excel Center has grown from one location with 300 students in 2010 to eleven with nearly 3,500 students in 2016. During that time, The Excel Center's staff has grown from 20 to approximately 250 fulltime staff and GEI's central office staff has grown to over 40 individuals. This growth is in large part due to GEI and GCSI's collection of skills, experience, and talents. As a result, The Excel Center's growth plans are supported by capable leaders, managers, and individuals who are committed to The Excel Center as a part of both GEI and GCSI's missions.

The support of GCSI has been a critical component of The Excel Center's rapid growth. GCSI's support infrastructure provides quality support that allows educational leadership to devote their time and energy to the formation of new schools and to shaping its culture. GCSI has developed strong capabilities in taking initiatives to scale across its geographic area, and GCSI's organizational culture emphasizes its staff's ability to mobilize quickly to take advantage of opportunities. The best evidence of this capacity is in the growth of GCSI's retail stores. Since 2004, GCSI has added or relocated more than fifty Goodwill stores. The experience GCSI has gained opening dozens of new stores – recruiting new staff, promoting the store in the local community, securing a building and making renovations – has enabled its marketing, finance, and facilities teams to develop competencies which have proven transferrable to opening and starting up new schools. GCSI's leadership team remains instrumental in the planning, execution, and design of opening new GEI-operated schools. Additionally, as GEI's support

[5] Hicks, Michael J. (2014). "Preliminary Fiscal and Earnings Assessment of the Excel Charter Academy". Center for Business and Economic Research, Ball State University.

infrastructure increases, GEI continues to learn from GCSI's retail operations about how to achieve results while managing operations across a wide geographic network.

The GEI Board of Directors acts as the ultimate governing authority of all eleven of The Excel Centers operated by GEI and, likewise, acts as the governing body over the four proposed schools in this application. The GEI Board of Directors has operated for over thirteen years. The group brings together an array of business experience in industries, public policy, education, finance, and workforce development. Board members choose to serve on the GEI Board of Directors for a number of reasons, including: a desire to improve the educational systems available to children and adults, a belief in the performance and mission of GEI, helping individuals reach their maximum potential, and hoping to see more individuals earn the basic credential most needed for a successful, productive life – a high school diploma. Collectively, this group has over 45 years of experience working as a school board for GEI. This leadership team has governed GEI since its founding in 2003 and has considerable knowledge of the local community and educational landscape. Board members as well as GEI's leadership team have extensive organizational leadership experience managing for-profit and not-for-profit businesses, working in public policy, serving on the boards of local community organizations, and managing schools in the local community.

Perhaps the most important factor that contributes to the successful leadership structure of The Excel Center, however, is the pipeline of talent being developed within the existing Excel Center network. The Excel Center strongly believes in investing in its staff in order to provide high-level leadership for existing schools, and to prepare for the future. The Excel Center has developed various leadership series to invest in its employees and to develop internal candidates to continue the successful growth and replication of The Excel Center. GEI's leadership pipeline will lend greatly towards the success of the new, proposed schools.

## Section I: Evidence of Capacity

### Governance

Key Members of the Applicant Group

Key staff members of GEI who have contributed substantially to the development of this charter application, the development of The Excel Center network, and/or school operations, are provided below. Included are key staff members' names, titles, and the specific roles they have played in the charter application, school development, or ongoing operations.

*Betsy Delgado, Vice President of Mission and Education Initiatives* – In July 2016, Betsy Delgado was named Vice President of Mission and Education Initiatives for Goodwill Industries of Central and Southern Indiana. In this role, she leads a new division that combines Goodwill's mission and education efforts that help individuals and families across 39 Central and Southern Indiana counties as they work to improve their lives through access to education, employment, and health services.

Betsy joined GCSI in 2011 as executive director of The Excel Center. In two years, she managed The Excel Center's growth from one site to nine. Promoted to Vice President of Mission Advancement in 2013, Betsy focused on expanding GCSI's mission to maximize support for and the advancement of individuals and families who engage in two or more of the organization's programs. She oversaw statewide expansion of Nurse-Family Partnership Indiana (NFP), the nationally recognized, home-visitation program for low-income, first-time mothers, of which Goodwill is the exclusive provider in Indiana.

Betsy has spent more than 20 years in the education sector, including working with state education and workforce development leaders to revise the funding and program structure for adult education. Eager to innovate, she was an early adopter of managed enrollment, career pathway development, and programming to bolster student education and employment outcomes.

*Jeffery Hoover, Senior Director of The Excel Center Network and Operations* – Jeff Hoover has served as an educator for the past 30 years. He had previously served as the Director of The National Office of The Excel Center and as the School Director of The Excel Center in Lafayette, Indiana.

Prior to joining GEI, Jeff served as Principal of Rossville High School for 5 years. During his tenure at Rossville, the school was recognized by the Indiana Department of Education (IDOE) for achieving an "A" three consecutive years. He also served on the DOE Advance Placement (AP) Advisory Council.

While serving as Assistant Principal at Northwestern High School, the school was also recognized by the IDOE as an "A" school and a National Blue Ribbon School by the United States Department of Education.

*Anne Davis, Senior Director of the Goodwill Education Initiatives* – Anne Davis joined GEI's leadership team as Senior Director of Goodwill Education Initiatives in 2016, bringing with her extensive educational leadership experience, having served at both the State and local school district level.

In her work at the Indiana Department of Education (IDOE), Anne served as the State Director of Special Education, as well as the Director of Individualized Learning, providing oversight and guidance to federal entitlement programs including IDEA Part B (Special Education), Title I, Title III (English Learners), and Title I Part C (Migrant Education). In these roles, Anne used data to support the compliance of Indiana's 370+ Local Educational Agencies (LEAs) with federal rules and regulations and provided support and accountability by assigning technical assistance, professional supports, and when necessary, corrective

action to ensure appropriate services for students eligible under these program areas. Additionally, Anne designed IDOE's consolidated grants monitoring system to maximize state resources while providing effective program area and fiscal oversight of Title I, English Learners, and Migrant Education and the $280M annually generated by those grants. Anne has also served at the Indiana Charter School Board (ICSB) as the Director of Accountability, where she facilitated the authorization, development, and assessment of charter schools through the processes established within the ICSB. Anne also supported ICSB's portfolio of schools in identifying areas of need by engaging in ongoing discussions about effective school development and innovative practices to meet students' needs.

Prior to her State-level work, Ms. Davis worked in a large urban school district, serving as a middle school teacher, school administrator, curriculum coordinator, and special education administrator. It was within these roles that Anne developed her focus on using data-based decision making as a means of significantly improving student outcomes.

*Shelley Ashley, Senior Director of Mission Advancement* – Shelley Ashley joined GEI six years ago as college transition counselor at The Excel Center. While at GCSI, Shelley has also served as quality control specialist and School Director of The Excel Center in Decatur. In the last six years, she has led the development and implementation of several cornerstone components of The Excel Center, including: new student orientation, credit tracking and graduation audits, senior seminar, dual credit, and certification offerings. Prior to working at GCSI, Shelley spent 14 years in higher education admissions and advising, including serving as co-director of admissions at Spring Arbor University in Spring Arbor, Michigan. She also spent a year teaching conversational English in public schools in Nyiregyhaza, Hungary.

*Nioka Clark, Director of Curriculum Services* – In May 2006, Nioka Clark graduated with a bachelor's degree in English Literature (with a minor in Secondary Education) from Saint Joseph's College in Rensselaer, Indiana. She began her teaching career the following fall at Crown Point High School, and spent the next four years teaching high school English in traditionally aged public high schools throughout the state of Indiana. In June 2010, Nioka accepted a teaching position with The Excel Center in Indianapolis, Indiana. During that first year, Nioka developed and implemented the Humanities curriculum for the innovative, accelerated pace of The Excel Center, and in 2012, she received a Master's degree in Secondary Education with a focus on curriculum technology. Since 2010, Nioka has held a variety of essential roles within The Excel Center, including opening the Lafayette Excel Center in 2013. Currently, Nioka is the Director of Curriculum Services for GEI and works closely with lead teachers and instructors to enhance their instruction.

*Jeff Curiel, Director of Financial Operations* – Jeff Curiel is GEI's Director of Financial Operations. In his role, he supervises all accounting and financial activities for GEI's 12 schools and other financial activities. In his previous position, Jeff was a Manager with Greenwalt CPAs, dedicating his time to serving not-for-profit organizations. Jeff's responsibilities include developing the budget for each school with school leadership, grant oversight, and maintaining GEI's long-term financial sustainability.

*Eliese Davis, Senior Talent Acquisition Manager* – Eliese Davis is a Sr. Talent Acquisition Manager who partners with strategic leaders to grow and develop the very best teams. With a concentration around hiring character and training skill, Eliese applies core knowledge in the areas of workforce planning, competency/behavior based interviewing, and strategic sourcing to ensure the right talent lands in the right position at the right time - every time.

Spanning almost 20 years in the recruiting profession, Eliese spent several years working as an Executive Recruiter with Fortune 500 and Fortune 1000 clients to fill their leadership openings. Craving a greater impact, she joined Goodwill Industries of Central Indiana in 2011 to help magnify the importance of education and self-sufficiency for the underserved. By sourcing mission driven top talent, Eliese has been an integral member of Goodwill's extensive growth over the past 6 years by leading the charge of sourcing and staffing for two large divisions - Mission Advancement and Goodwill Education Initiatives.

*Markous Jewett, School Development Director* – Markous Jewett is the School Development Director for GEI and has worked in education for 7 years, beginning as a Behavior Specialist for a traditional public school system in his hometown of Richmond, Indiana before joining GEI and The Excel Center network as a Lead Humanities Teacher in 2013. Markous was quickly promoted to School Director at The Excel Center – Richmond in 2015 where he helped guide a team of staff and students to two consecutive "A ratings" from the Indiana Department of Education. Markous most recently took a position as the School Development Director in May of 2016 for The Excel Center National Office, a position created to provide operational support to help newly approved Excel Centers open successfully. Markous is also tasked with providing ongoing support to these schools to maximize outcomes for their students and communities. Markous's background working with district-level initiatives, both within The Excel Center network and from his time in traditional public schools, has greatly contributed to implementing successful initiatives in the all the schools with which he has worked. These experiences include: Positive Behavior Intervention and Supports implementation, Response to Intervention monitoring, anti-bullying initiatives, Crisis Prevention Intervention training and documentation, and individualized training and professional development creation through an instructional coaching lens.

*Kim Reier, Director of Network Development and Advancement* – Kim Reier has worked with GEI for four years and has held previous roles at the Indianapolis Mayor's Office and the Indiana Department of Education. In her role at GEI, Kim assists with the development and growth of The Excel Center network nationally. During her tenure at GEI, Kim has managed the successful school approval process for twelve schools. Kim also manages relationships with other Goodwills interested in pursuing The Excel Center, has conducted feasibility studies, and assisted Goodwills and provided guidance through the legislative process in states where legal and regulatory barriers have prohibited the opening The Excel Center.

*Jennifer Rendant, Director of Marketing* – Jennifer Rendant is the Director of Marketing and Communications for GEI. Jennifer works as a strategic partner with GEI to lead the marketing communication efforts and develop strategies for existing initiatives and expansion of new schools. She develops marketing plans and strategies and conceptualizes, writes, and directs editorial content. Jennifer also develops the online presence for Indianapolis Metropolitan High School, The Excel Center (GEI and Network) and INISchools. In her role, Jennifer also coordinates mission awareness strategies, including media relations, the development and implementation of communication tools, and collaborates with the marketing creative services team as they develop collateral, art, video, graphics, and strategies to brand GEI's programs and any further expansion. A public educator for seven years, Jennifer also served as English Department Chair, Public Law 221 Chairperson, and Lead Teacher in various school districts, contributing to educational communities on a more interactive level. She continued her commitment to education by studying Strategic Communications at Purdue University, graduating with her Master's of Science in 2015. This is her fourth year at GCSI.

*Dan Scott, Director of Data Services* – Dan Scott came to GEI in 2012 from the Indiana Department of Education where he helped create that state's A-F school accountability model. At GEI, Dan oversees a

team responsible for providing data analysis and support to the organization's schools and mission programs, helping to create a culture of constant evaluation and improvement. While at GEI, Dan also helped develop the nation's first adult high school accountability model and continues to support Goodwill's schools through these efforts and various strategic grants and external opportunities.

*Tonya Taylor, Director of Special Education* – Tonya Taylor is Director of Special Education at GEI. With over 16 years in public education, Tonya has an extensive background in implementing comprehensive programs for students with disabilities. In addition, Tonya is responsible for ensuring federal and state compliance for all students with disabilities and English Language Learners. Tonya holds a BA in Elementary Education from the University of Southern Indiana and a MA in Special Education Administration from Indiana University.

In addition to the above listed GEI staff members, the following list of key individuals serve on the Board of Directors of GEI:

- Claudia Cummings
- C. Perry Griffith, Jr.
- Betsy Delgado (please see above for more information)
- Marianne Glick
- Richard Horn
- Jill Kramer
- Kent Kramer
- Rose Mays
- Jay Oliver
- Don Palmer
- Doris Pryor

The resumes for all individuals listed in this section are included as **Attachment 1**.

<u>Governance Structure</u>

The GEI Board of Directors acts as the ultimate governing authority of all eleven of The Excel Centers operated by GEI and, likewise, will act as the governing body over the four proposed schools in this application. The GEI Board of Directors has operated for over thirteen years. The group brings together an array of business experience in industries, public policy, education, finance, and workforce development. Board members choose to serve on the GEI Board of Directors for a number of reasons, including: a desire to improve the educational systems available to children and adults, a belief in the performance and mission of GEI, helping individuals reach their maximum potential, and hoping to see more individuals earn the basic credential most needed for a successful, productive life – a high school diploma. Collectively, this group has over 45 years of experience working as a school board for GEI. This leadership team has governed GEI since the Indianapolis Metropolitan High School was founded in 2004 and has considerable knowledge of the local community and educational landscape. The Board of Directors has extensive organizational leadership experience managing for-profit and not-for-profit businesses, working in public policy, serving on the boards of local community organizations, and managing schools in the local community.

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

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

In addition, the GEI Board of Directors is responsible for periodically (no less than annually) reviewing and evaluating the relationship between GEI and GCSI to ensure that services provided to the schools by GCSI are meeting quality expectations, providing good value for the school, and are enhancing GEI's objective of being a good steward of its state and federal resources.

Jeffery Hoover, Senior Director of The Excel Center Network and Operations, has direct oversight of each of the schools operating within GEI's network of The Excel Centers. Mr. Hoover reports directly to GCSI's Vice President of Mission and Education Initiatives, Betsy Delgado, who is sits on GEI's Board of Directors. The School Director of each school reports directly to Mr. Hoover.

A high-level organizational chart for GEI is provided in **Attachment 14** (in addition to a school-level organizational chart) to further illustrate the governance structure of GEI and The Excel Centers.

<u>Advisory Bodies</u>
Although the Board assumes sole governing authority over The Excel Center, to the extent possible, the Board will engage members of each of the communities where The Excel Centers are located, including students, to inform school direction and policies.

Each location of The Excel Center will either (1) have an advisory group to ensure that The Excel Center is providing a relevant educational program that meets the local community's need or (2) participate in a variety of community-based committees or coalitions. Advisory groups will meet six (6) times annually at each site location and will be a means by which The Excel Center communicates with the community at large.

The advisory groups will be responsible for providing input to The Excel Center on the factors that are at play in the local environment, including major economic changes or shocks, changes in the political environment, and any major news that would affect the performance and/or long-term success of each Excel Center location. Moreover, advisory groups will provide a community voice to the schools.

Advisory groups will consist of 8-10 members and include relevant stakeholders in The Excel Centers' 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 of each school will be responsible for managing the relationship between the school and the advisory group; he/she will set agendas for each meeting. As needed, agendas will be developed in collaboration with the Board of Directors.

In instances where The Excel Center does not develop an advisory board and, instead, participates in a variety of community-based committees or coalitions, the School Director or his/her designee will be expected to participate in all relevant meetings. Among many others, some examples of local groups where The Excel Centers have representation include: local United Ways; local chambers of commerce; the Human Capital Pipeline; Wayne County Literacy Coalition; and focus groups consisting of business owners, local community colleges, economic development committees, and local school district representatives.

Grievance Process

In the event that a parent or student has an objection to a Board of Directors policy or decision, the issue will be forwarded to The Excel Center School Director. If the School Director is unable to resolve the question, the student/parent is able to take that request to the Board. It should be noted that the GEI 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.

Documents related to the meetings of the GEI Board of Directors are available to individuals free of charge. Students receive a student handbook which outlines the school's grievance process.

Head of School Candidate

Leadership selection and development will continue to be a critical component of The Excel Center's growth plans. The Excel Center's success in new locations will be driven by the ability to attract or promote high quality school leaders. Each new Excel Center site must have an effective local director who can manage the staff and team of the school in that location.

To date, School Directors have not yet been identified to lead each of the proposed Excel Centers. Each School Director will be identified at least 6 months prior to each school opening.

To hire a high quality School Director, The Excel Center's primary strategy will be to recruit an individual from within The Excel Center network who has a track record of success and who has successfully completed The Excel Center's Technical Leadership Series. GEI developed the Technical Leadership Series to develop a talent pipeline of teachers, staff, and school leaders. The Technical Leadership Series is comprised of eight training and development sessions, each of which teaches a specific set of imperatives that potential leaders can apply immediately to enhance their current role and prepare them for a next level leadership position. The selection process includes high performance in a staff member's current role, high performance with accelerated assignments, the desire to grow within the organization, and the ability to balance aptitude and ambition.

The Technical Leadership Series explores The Excel Center model, its culture, academic performance, its financial framework, legal implications, and business continuity plans. Expert presenters present an interactive and engaging series of training sessions that culminate in several forms including: case studies where technical elements are applied; dilemmas that will challenge participants to develop a philosophy around an idea and make a decision; and personal evaluation, discussion, and reflection. Participants should be able to quickly identify a problem, collaborate with current Excel Center leaders

across the entire Excel Center network to create a solution, and make changes happen – all with the support of leadership.

The Technical Leadership Series is designed to strengthen and increase technical skills such as innovation, problem solving, and strategic planning under the direction of GEI leadership and personnel that are experts in their chosen field. Participants gain specialized knowledge in areas that specifically address charter school challenges and they learn the skills needed to effectively take on a leadership role within The Excel Center. Participants that successfully complete the series continue their leadership development with personalized mentoring and advanced assignments to accelerate obtained knowledge to application.

As a secondary strategy to hiring a high quality School Director, The Excel Center will use more traditional recruitment strategies, outlined in the "Human Capital" portion of Section III (Implementation Plan) of this application.

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 ensures that the school curriculum is applied according to the principles of The Excel Center and that school is meeting the desired outcomes. Specific responsibilities include:

- Developing strategies, goals, and objectives for the school and managing the implementation of these objectives;
- Participating in the development of overall educational strategies;
- Assisting instructors in setting priorities, facilitating meetings, and developing their leadership skills;
- Providing leadership in the development of new partnerships and/or methodologies in response to the changing needs concerning students, test results, and/or Indiana College and Career Readiness Standards; and
- Representing the school, as appropriate, in the local community.

School Development Efforts

Jeff Hoover, Senior Director of The Excel Center Network and Operations, will lead development of the new schools between the time of authorization and opening. Mr. Hoover is actively on GEI's payroll and oversees all The Excel Centers within GEI's network. He will continue to be compensated throughout the start-up and operational periods of each school. Mr. Hoover will be supported by all relevant roles within GEI's operating structure. Furthermore, once selected, the School Director will take an active role in school start-up and lead the day-to-day operations of the school.

Administrative/Management Team

Members of the school's administrative and management team include the (1) Lead Teacher, (2) Lead Coach, and (3) Manager – Office Administrator. In order to ensure that Leads are well-prepared to assume their roles, GEI has developed a Technical Leadership Series for Leads that takes place once a year for staff members aspiring to become Lead Teachers and Lead Coaches. Through this series aspiring lead teachers are guided through a cohort consisting of eight sessions by Senior Directors, School Directors, current Lead Teachers, and other GEI personnel that focuses on the development of skills found most necessary to become a Lead Teacher. Likewise, aspiring Lead Coaches are led through eight similar session cohorts led by Senior Directors, School Directors, current Lead Coaches, and other GEI personnel to develop those skills most highly utilized in the Lead Coach role.

**Management**

The GEI Board of Directors does not intend to contract with an Education Service Provider for school management services. As the largest charter school network in Indiana, GEI has developed a robust administrative central office that supports all functions of the schools it operates. As such, GEI will not contract with service providers for any school-related services.

Please see **Attachment 4** for a table outlining and depicting school, network (GEI), and governing board-level decision-making authority as it relates to key functions of the school, including curriculum, culture, staffing, corrective actions, etc.

**Network Vision, Growth Plan, and Capacity**

Please see **Attachment 5** for a 5-year business plan addressing GEI's plan for The Excel Center expansion in Indiana.

## Section II: School Design

### Innovation

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

### Curriculum and Instructional Design

The Excel Center model was designed with "the three Rs" as foundational to its design: Relationships, Relevance, and Rigor. Adult learners benefit from strong relationships with peers and staff; these relationships provide consistent support for student education, strengthen motivation to achieve goals, and build resiliency to overcome obstacles that might impede progress. Students who have dropped out require flexibility in their educational programs; students will enroll in The Excel Center at various skill levels and will balance their education with many life obstacles, including work and family obligations. Therefore, The Excel Center will use a "one student at a time" method where each student will establish his or her educational goals and move at his or her own pace to achieve those learning goals. The Excel Center's primary focus is to develop each student's ability to be successful in post-secondary environments and to develop the skills required in the modern workforce.

The Excel Center'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 address the barriers which impede a student's continued educational success. Please see the graphic on the following page.

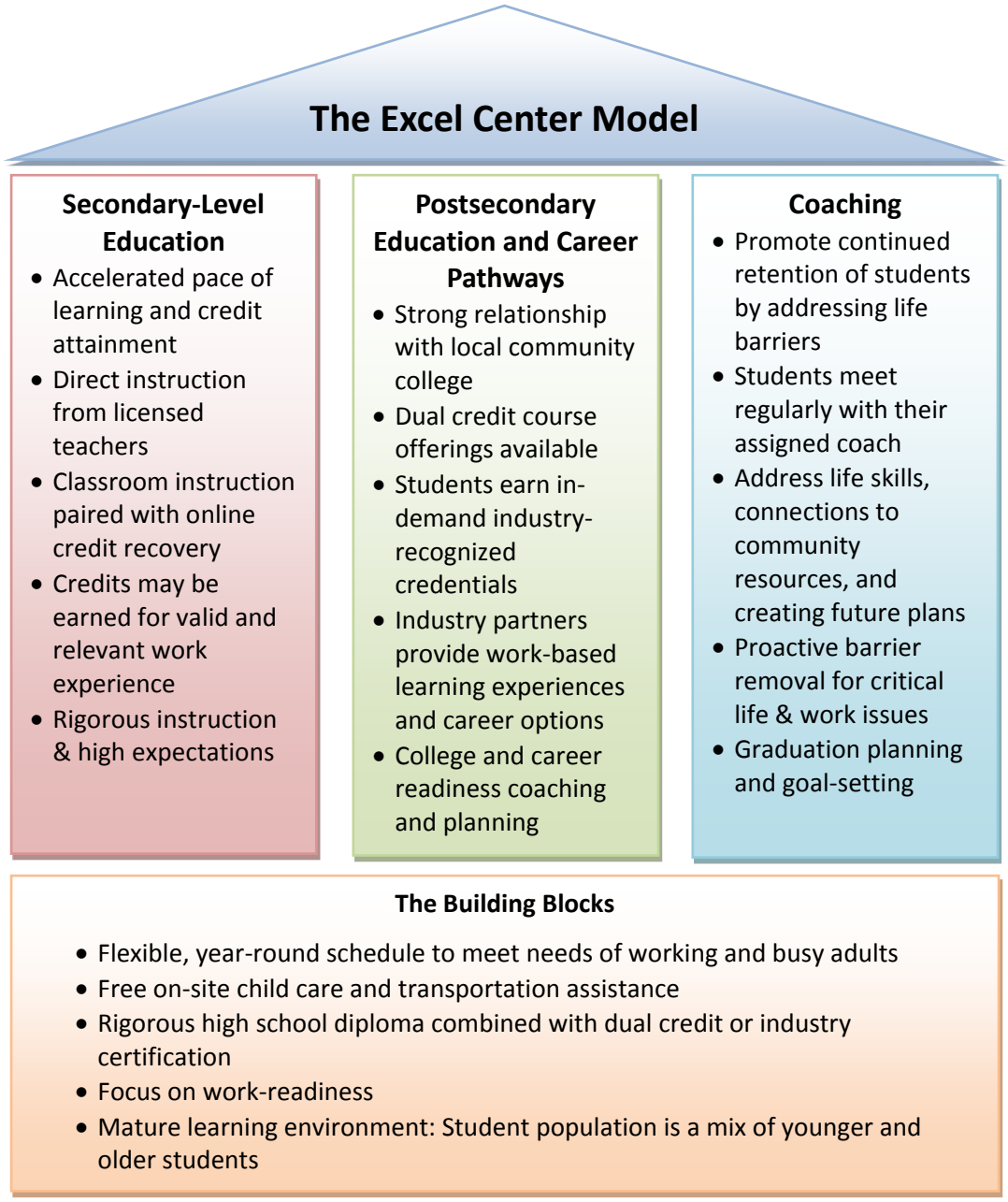
<u>Secondary-Level Education</u>

Academic instruction for students who have dropped out requires flexibility in the design of the educational program. Students will enroll in The Excel Center at various skill levels, have different numbers of credits to achieve, and many will balance their educations with life obstacles, including work and family obligations. Therefore, The Excel Center will use a "one student at a time" method where each student establishes his or her educational goals and moves at his or her own pace to achieve learning goals. Every student at The Excel Center will have a unique educational plan, and school staff will work with each student to craft an educational program that fits his or her specific needs.

The environment within The Excel Center is designed to meet adults' learning needs by encouraging them to see the relevance and importance of their education while providing a mature environment for learning and discussion. The school is designed to reflect the characteristics of educational environments that benefit adult learners, including open discussion, self-directed learning and personal accountability.

The Excel Center has established a learning environment that meets adults where they are academically. Students participate in fixed-time classes where they cover key academic subjects in language arts, mathematics, social studies, and science. These courses are designed to build skills, learn material, and engage with students. However, many students come to The Excel Center requiring significant

remediation and special supports. For these students, reading, math, and basic skills labs allow them to learn critical information when they need it. The typical class includes between 10 and 15 students in each course. Courses often 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.




Additional resources support the unique needs for adults outside of the core fixed-length courses. A small portion of credits are attainable via online credit recovery format. In addition, students who have demonstrated high skill levels are be eligible to enroll in dual credit courses, thereby beginning their pathway and success in working towards postsecondary education goals.

Technology features prominently in the design and delivery of academic content in The Excel Center. Coursework is presented in multimedia formats, reaching different learning styles, personalities, and groups. In addition, students are able to participate in computer-based instruction for online credit recovery, assessment, and for tutoring-based work.

Postsecondary Education and Career Pathways

The Excel Center prepares students to learn the general skills necessary to become successful in the 21st-century workplace. The Partnership for 21st Century Skills developed a framework that identified many of the critical competencies and skills essential to students preparing to enter the workforce in the 21st century. These skills are grouped into four general categories: (1) a strong mastery of core subjects and knowledge of 21st century issues; (2) life and career skills; (3) learning and innovation skills; and (4) information, media, and technology skills. Building upon Indiana College and Career Ready Academic Standards, The Excel Center's emphasizes these skills so that students are better prepared in the modern workforce. Students will build on themes and case studies applied in workplace contexts, encouraging students to develop and demonstrate skills that will be valuable in workplace environments. Opportunities for students to demonstrate these skills are woven into core content and school progress. The school's emphasis on these skills enables each student to understand how mastery of the core curriculum can be used as a means to develop skills that will be important in his or her career.

Many individuals who have dropped out of school will re-enter the educational system when they find that there are few employment opportunities available for individuals who lack a high school diploma. To respond to this demand, The Excel Center's coursework and learning environment enables students to access greater career opportunities. Students' educational plans will build towards post-secondary certificates and/or advanced degrees that lead to career pathways with better-than-average growth potential in the local economy. These academic goals include courses at post-secondary institutions, typically Ivy Tech Community College (although sometimes others), that offer tangible skills training to equip students for future careers.

The Excel Center promotes students' awareness and access to valuable careers by introducing students to the benefits, details, and possibilities of a number of careers, and helping to outline the path a student may take to enter a career in a given field. Every Excel Center site prioritizes high-growth industries in the local economy and presents them its students. For many of The Excel Center's students, earning a high school diploma and improving their job prospects were primary reasons to enroll in school, but few students have thought about what career to enter after graduating. Therefore, The Excel Center spends significant amounts of time introducing students to industries and fields where there are good prospects of finding stable employment and finding a career in an industry with growth potential.

Coaching

Life coaching in The Excel Center model addresses the life barriers and issues that prevent students from being successful. The Excel Center coaches are responsible for keeping students engaged and motivated in the school. The relationship that coaches create with each student is a critical factor in student success, as that relationship will provide security, confidence, and encouragement for students to continue when the work becomes challenging and life barriers become difficult to manage. Coaches will work with students to identify potential barriers to students' continued education, whether short-term barriers (such as housing and childcare) or long-term challenges (including student self-efficacy and self-confidence).

The Excel Center will prepare students for and introduce them to postsecondary education through opportunities that are relevant to their educational and career goals. Students will cover the basic requirements to receive a high school diploma and enroll in some form of postsecondary education, whether an industry certification program or a track moving towards an associate's or higher degree.

Evidence-Based Support

The curricular foundation of The Excel Center is based upon significant evidence that its model meets the educational needs of adults. The foundation of The Excel Center's curricular approach is found in: Brookfield, S. *Developing Critical Thinkers: Challenging Adults to Explore Alternative Ways of Thinking and Acting*,[6] *Mentoring Adult Learners: A guide for Educators and Trainers*,[7] and *Mentor: Guiding the Journey of Adult Learners.*[8]

A significant number of adults who have dropped out of school nevertheless show a strong desire to continue their education. However, many students struggle to complete their education as skill deficits and life challenges often impede progress. Below are a number of barriers adult students face – which may impact their success in earning a high school diploma – as well as an overview of the ways The Excel Center works to address and overcome those barriers.

**Barrier 1: Low credit attainment and academic skill gaps**

Students will arrive at The Excel Center at a variety of academic levels; students will have different levels of credit attainment and they will arrive at different skill levels. In some cases, students may have a transcript that shows they earned certain course credits but, when assessed, their scores may indicate that they do not have mastery over the material.

***Solution: Meet students where they are.*** The Excel Center will work with students in each of these profiles, designing an educational program that meets adult students' needs. To ensure that the school is fulfilling its top two priorities – provide students with an opportunity to earn a regular high school diploma and prepare them for "what comes next"– The Excel Center will dedicate considerable resources to helping students be prepared and successful. The Excel Center has dedicated remedial efforts for students who are not ready for high school-level coursework and evaluates student progress through regular testing.

**Barrier 2: Traditional school hours interfering with the real demands of adult life**

Adults must often prioritize child care needs, family situations, or the need to work over being in a classroom during traditional school hours. The real demands of life may be the reason that some students dropped out of school in the first place and are often barriers to students re-entering school to earn a high school diploma.

***Solution: A school schedule that meets the needs of adults.*** The Excel Center will operate a balanced school calendar, with five eight-week terms in each academic year. Credits can be earned each term and students and teachers will work diligently to condense a semester's worth of material into each term. This schedule will allow students to earn credits quickly and make rapid progress towards their diploma. The Excel Center's curriculum integrates material across disciplines so that one course combines academic standards across multiple subjects, allowing students to earn credit in multiple areas while

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[6] Brookfield, S. (1987). *Developing critical thinkers: Challenging adults to explore alternative ways of thinking and acting.* San Francisco.

[7] Jossey-Bass., Cohen, N. (1995). *Mentoring adult learners: A guide for educators and trainers.* Malabar, FL.

[8] Krieger, and Daloz, L. (1999). *Mentor: Guiding the journey of adult learners.* San Francisco.

attending one class. The school will be open to students in the morning, afternoon, and/or evening, based on student need and demand.

**Barrier 3: Balancing work and family life**
Some of The Excel Center's students will have to take care of their children while also trying to continue their education. Many parents put off returning to school because they lack the ability or financial resources to pay for quality childcare.
***Solution: Free and reliable child care for students.*** To help students continue their education, The Excel Center operates a child drop-in center. This center allows for children of The Excel Center students to be cared for while their parents are in class. The primary focus of the drop-in center is to give parenting students the opportunity to focus on their education knowing that their children are in a safe and secure environment. The drop-in center will be a free childcare option for children of parents who are attending The Excel Center.

**Barrier 4: Lack of focus**
Students entering The Excel Center will be able to focus on school to various degrees due to many students balancing school work with the needs of work and family. Having previously dropped out of high school, students may also struggle to reengage in their education.
***Solution: Addressing challenges outside of the classroom.*** Life Coaching in The Excel Center model addresses the life barriers and issues that prevent students from being successful. Coaches will be responsible for keeping students engaged in school and motivated to be successful. The relationships that coaches create with each student will be a critical factor in student success; those relationships will provide security, confidence and encouragement for students to continue when the work becomes difficult and life barriers become difficult to manage. Coaches will work with students to identify potential barriers to students' continued education, whether short-term barriers (such as food assistance or transportation) or long-term challenges (including student self-efficacy and self-confidence).

**Barrier 5: Identifying a career path and setting goals**
For most of The Excel Center's students, earning a high school diploma will be the primary reason to return to school, but few students will have thought about which career to enter after graduating.
***Solution: Preparing students for "what comes next."*** The Excel Center will spend a significant amount of time introducing students to high growth, high demand fields where there are good prospects of finding stable employment and a career. The Excel Center's goal is to prepare individuals for self-sufficiency. A high school diploma is an essential start, but a credential above a high school diploma is essential for ensuring long-term employability in the modern job market.

Many of these struggles are such that traditional approaches to re-engaging this population are often insufficient. The 2006 Gates Foundation report, "The Silent Epidemic," surveyed dropouts about the reasons they left school. The research indicated that failing in school was cited by only 35 percent as a reason for dropping out. Instead, a substantial portion of students left school for non-academic reasons. In particular, life circumstances such as needing to work, pregnancy and parenting, or caring for other family members were most prominent.[9] These challenges also affect the structure of how students continue their education.

[9] Bridgeland, J.M., DiIulio, J.J., & Morison, K.B. (2006).

Complete College America's 2011 report,[10] "Time is the Enemy," highlights how, for many adults in college, taking an extended period of time to progress through school is a major detriment to their lasting success. Although the report's findings focused on postsecondary education, its lessons about adult learners have been incorporated into the design of The Excel Center. For students who are balancing commute times, family obligations, work, and school, lengthy educational programs with few rewards are a major barrier to ongoing success. The following elements of Complete College America's recommendations have been incorporated into the academic design of The Excel Center:

- *Use block schedules with fixed and predictable classroom meeting times.* The Excel Center's classes will be 90 or 180 minutes each day, with student schedules fixed for each 8-week 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's balanced calendar takes minimal breaks and operates on five 8-week terms, as shown in the academic calendar in **Attachment 8**.
- *Simplify the registration process.* Students will enroll in one coherent program during iExcel (student orientation).
- *Form peer support and learning networks.* Students will build relationships with other students and teachers in The Excel Center's small school environment. In addition, life coaches will work to ensure that students remain engaged in the school's academic program and feel like they belong.
- *Embed remediation into the regular educational design, so that students do not waste time before they start earning credits.* Remedial courses allow students to earn elective credit while providing remedial work.

The Excel Centers in Central Indiana have demonstrated that this school model is effective in engaging adults who have dropped out of school and in leading them to earn high school diplomas and beyond. There are now eleven Excel Centers operated by GEI, serving approximately 3,500 students in seven cities in Indiana. As of January 2017, there have been 2,385 Excel Center graduates since the school opened in 2010. Of those graduates, nearly 90% have earned an industry certification or earned college credits at the time of graduation.

A research study conducted in Indiana looked at state-level wage data and determined that there are significant benefits to employment levels and to earnings of Excel Center students. Graduating from The Excel Center improved an individual's likelihood to be employed and earn higher wages than high school dropouts. Graduates created a total benefit of $9,330 per student, and students who attended but did not graduate had a benefit of $835 per student.[11]

Instructional Strategies

Adult students returning to school to earn their high school diploma bring with them a wealth of diverse backgrounds and experiences. Designing a successful high school educational plan for these students requires embracing and responding to the diverse needs of adult learners. A student-centered, teacher-facilitated classroom provides the quality instructional support and differentiation these students need. Most classrooms will utilize a student to teacher ratio of 20:1 (depending on course demand in any given term) to maximize teacher to student contact and to provide the optimum conditions for students

[10] 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

[11] Hicks, Michael J. (2014). "Preliminary Fiscal and Earnings Assessment of the Excel Charter Academy". Center for Business and Economic Research, Ball State University.

to learn content and skills. However, students who are close to graduation and need one course or one semester of one course may earn the credit through a research-based, teacher-facilitated individualized online learning environment. Courses are structured into extended blocks, allowing for compacted content and intensive work. Course blocks are 90 minutes or 180 minutes in length and will meet daily for the duration of each 8-week term.

All of The Excel Center's course offerings will be taught via direct instruction utilizing the instructional approaches outlined below. Students who come to The Excel Center with partial credits in courses may complete certain courses via online learning opportunities.

Students who enroll in The Excel Center will have the freedom to choose morning, afternoon, evening, and online classes. The Excel Center's 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.

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.[12] The goal of every course is independent student mastery of the content, skills, and standards to which the course is aligned. Teachers at The Excel Center will know that all students, but particularly adult high school students, require teacher and peer supports as they practice toward independent mastery. 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 doing the "You do it alone" phase of the lesson. All of The Excel Center's lesson plans 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.[13] In all courses, teachers utilize modeling and speaking metacognitively about the academic tasks. Adult students who have not experienced success in high school often require instruction in how to approach math problems, how to make sense of a complex text, and how to more deeply engage with the learning process. All course scope and sequence documents outline the "Goals and Objectives for Shaping Attitudes Toward Learning," in addition to the subject matter content and skills.

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[12] 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.
[13] 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.

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 sites as well as scientifically-based research performed by the U.S. Department of Education[14] indicate that explicit instruction in disciplinary literacy strategies positively affects reading comprehension and student self-confidence.[15] The Excel Center's teachers 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 text. Incorporating disciplinary literacy strategies with the gradual release of responsibility model requires extensive teacher modeling, leading to independent student mastery.

Different Key Educational Features

The Excel Center does not intend to implement any key educational features that would vary from the education model that is currently operating in Indiana.

Curriculum

The Excel Center's curriculum is an individualized road map to student success and serves as a customizable guide that assists in planning each student's instructional program. The Excel Center's curriculum has two overall goals: 1) teach the necessary content to graduate from The Excel Center with a high school diploma 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 Readiness Standards. The school blends coursework in engaging and interesting ways that also allow students to learn what they need. Instead of distinct grade levels, The Excel Center uses mastery to determine if a student is eligible to attend courses.

An overview of The Excel Center's Course Scope and Sequence is provided as **Attachment 6**.

**Pupil Performance Standards**

The Excel Center's academic content is aligned with the Indiana College and Career Readiness Standards and uses these standards throughout its coursework and lesson plans. All standards were deconstructed and opportunities for integrating courses were utilized to make the content explicit and meaningful. The Excel Center's Academic & Exit Standards are included as **Attachment 7**.

Due to the nature of students entering the school at a variety of different skills levels and course needs (pursuant to their transcript), and those skill levels not necessarily matching credits previously earned, The Excel Center does not operate using distinct grade levels. Instead, students matriculate through the curriculum at an accelerated pace, ensuring they build the requisite skills needed to enter the next course in The Excel Center's course progression, and by completing all credit and graduation requirements prior to graduation.

Although it can be useful in conventional academic situations with traditional student populations, a grade level categorization would have little benefit to a typical adult student. For example, the

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[14] 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

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

“freshman” label on an adult learner may create the mistaken belief that it will take several years to complete the work in The Excel Center, even though the student’s self-directed pace may mean that he or she could complete requirements before that time.

Students routinely meet with their individual life coaches to assess where they are academically and where they need to be in order to meet all of their academic and career goals as well as where they need to be in order to graduate. Graduation criteria are also listed in the Student Handbook.

**High School Graduation Requirements**

To graduate, a student at The Excel Center must fulfill the graduation requirements for the State of Indiana as established by the Department of Education. Students will work towards a Core 40 diploma, earning credits with the following requirements:

- 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 Credits

Students will earn credit hours by successfully demonstrating mastery over the standards established in each course. Teachers assess mastery by monitoring student work and evaluating their growth. By integrating coursework across domains, some course offerings allow students to earn multiple credits through the work of one class. Each class is mapped to indicate which credits apply toward a Core 40 diploma and students earn credit by demonstrating satisfactory completion of a course and earning a passing grade higher than a D in that course.

Student transcripts from other schools will also be reviewed to determine if any coursework completed prior to enrolling at The Excel Center applies to the Core 40 diploma requirements. In addition, students who can demonstrate proficiency through ECA testing can earn credits for courses in which they have already demonstrated knowledge. Students may also earn credit by enrolling in dual-credit programs at a local community college. In these instances, these credits are listed as transfer credits and not as credits explicitly granted by The Excel Center. Some courses that are required for the Core 40 diploma will be available for students to take via online credit recovery courses.

Student grade-point averages (GPA) are calculated based upon the grades that students earn in each course, using a traditional scale and averaged upon the points earned for each credit. In courses that are awarded multiple credits, the student’s letter grade applies the same point for each of those credits earned. For blended courses, a student earns a GPA based upon their performance for that particular domain within the course and earns credit for that portion of the classroom setting.

Student transcripts include the school’s contact information, the student’s contact and demographic information. In addition, the transcript details the time period (in terms) during which the student was enrolled at the school, and his or her record of courses taken and credits earned. Each course includes the grade earned and grade-point equivalent for that class. Transcripts also include the student’s

performance on standardized testing, including End-of-Course Assessment (ECA) scores and GQE scores (for older students).

The Excel Center offers elective courses that meet the educational needs of students. Most of these electives prepare students to explore the viability of a career in a high-growth, in-demand sector of the local economy. Electives (and potential certifications) that may be offered based on demand include:

- Advanced Manufacturing (MSSC)
- Apartment Maintenance
- Business Communications (CBP, TSIA CSP-1)
- CADD Technician (AutoCad)
- Career Planning and Success Skills
- Certified Production Technician (MSSC)
- Childhood Development (ECE)
- CNC Machining (NIMS)
- Computer Applications (A+, CINS, MOS, MTA)
- Construction Technology
- Current Problems, Issues, and Events
- Electronic Telecommunications Certification (ETC)
- Emergency Medical Services (EMT)
- Film Literature
- Health Education (PHTE, CMA, CNA, Phlebotomy)
- HireTech A& B (APICS, CLA, Safety)
- Hospitality Management (CGSP)
- Logistics (CLA)
- Marketing
- Material Handling (OSHA Forklift)
- Medical Terminology (Coding)
- Professional Career Internship
- Psychology
- Science Research
- Speech
- Tractor Trailer Operation (CDL)
- Welding Technology (AWS)

Even though it is not an Indiana graduation requirement, an Excel Center graduation requirement includes participation in at least one dual credit or industry certification course. This requirement encourages the pursuit of a post-secondary education for greater career opportunities. The vast majority of these offerings are provided in cooperation with Ivy Tech. The additional Excel Center graduation requirement of post-secondary coursework not only gives students a taste of college and their ability to complete college-level work, but often provides a transferable credential in a high-demand career field, increasing employment opportunities. Through dual credit classes, students can begin their post-secondary career with earned credits toward their degree.

Maintaining the Indiana Core 40 standard allows Excel Center students to receive the same accreditation as a traditional high school student. This credential allows them to apply to college, post-secondary programs, military, and employment opportunities, demonstrating they had the persistence and motivation to complete their diploma.

In order to graduate successfully, students must also pass ECAs. The Excel Center purposely structures significant time into coursework to prepare for ECA exams. For many students, the limited testing windows of ECA means that students may have completed all of their credits only to wait until ECA testing is again possible. For these students, The Excel Center encourages them to begin enrollment in postsecondary courses until they can complete testing.

The Excel Center model provides a number of supports for students at-risk of dropping out or not meeting graduation requirements, since it is designed to meet the needs of students who have already dropped out of a high school. The curricular focus is around accelerating the pace at which a student can earn a high school diploma, gaining exposure to new careers (and postsecondary education required to enter those careers), and becoming reengaged in the educational system. Students who continue to make consistent academic progress – no matter the pace – will be encouraged to continue working towards their high school diploma.

Additionally, coaching in The Excel Center model is an attempt to address the life barriers and issues that prevent students from being successful. The Excel Center coaches are responsible for keeping students engaged and motivated in the school. The relationship that coaches create with each student is a critical factor in student success, as that relationship will provide security, confidence and encouragement for students to continue when the work becomes difficult and life barriers become difficult to manage. Coaches will work with students to identify potential barriers to students' continued education and develop action plans to balance family, work, and school responsibilities.

**School Calendar and Schedule**

Proposed Academic Schedule

The Excel Center operates a balanced school calendar with minimal breaks. The Excel Center's 2017-2018 academic calendar for The Excel Center is provided as **Attachment 8**, along with sample weekly schedule of classes. The Excel Centers located in Indiana all follow the same, general school calendar. School calendars are determined at the end of the prior school year, after the IDOE publishes mandatory assessment testing windows.

The Excel Center will operate with 162 days of accelerated, scheduled instruction and an additional 39 days of instruction available to students, as needed, on Fridays, functioning year-round. A typical school week includes four days of fixed-time classroom instruction (Monday through Thursday) and one day of self-directed student learning (Friday). Fridays are available for teachers and staff to prepare for classes, hold case conferences, staff meetings, and one-on-one tutoring sessions and meetings with students.

The school calendar is designed to reinforce educational success by accelerating the pace at which students can earn credits. The school's class schedule operates on 8-week terms. This structure gives students the ability to earn credits on a faster pace than in a traditional 15-week semester. After an 8-week term is completed, students are then assigned into a new schedule with new coursework.

Classes consist of extended teaching times of 90 minutes each, with some courses merging periods together for 3-hour blocks. Classes may be scheduled from 9:00 am until 8:00 pm, Monday through Thursday, depending on the needs of students in a given term. Not all students will be enrolled in classes for all 6 periods each day, but will attend classes when their schedules allow, fitting coursework in together with work or family responsibilities. Each day of fixed-time instruction may provide up to 9 hours of instructional time available for students. Each week may include up to 36 hours of fixed-length instruction.

The Excel Center staff will adjust classroom schedules to meet the students' credit needs and their ability to attend classes for each term. On Fridays, students are able to continue on online credit recovery courses, take diagnostic or formative examinations, work with a tutor, or meet with their

instructors in one-on-one meetings. Students are encouraged to use Fridays to schedule or take care of other personal obligations such as doctor appointments.

Because of the variability of student schedules within the 8-week terms, a student may not take time in all four subjects during a given school day. As a result of flexible scheduling to meet student body credit needs, some courses (including basic skills instruction) will be offered every term, while others (higher-level math and English courses) are offered less frequently but at least every other term. For a student enrolled in any one of these classes; however, he or she would have minimum instructional times for the following subjects (above).

- Language Arts: 1 ½ hours (90 minutes)
- Mathematics: 3 hours (180 minutes)
- Science: 3 hours (180 minutes)
- Social Studies: 1 ½ hours (90 minutes)

Non-Academic Programs

Because the primary goals of adult students are increased educational attainment and career opportunities, programs are largely academic, without the distractions of athletic teams or music groups. Course offerings are developed upon review of the courses needed by the students enrolled at the school. The Excel Center is designed to be adaptable to student needs and the course schedule and offerings are often changed each term in order to meet student needs. Furthermore, this means that the course schedule and specific courses offered each term vary from one Excel Center to another. A variety of activities will take place in the facility throughout each school day, including classes, one-on-one tutoring, self-directed study, and coaching activities.

**School Culture**

The environment within The Excel Center is designed to meet adults' learning needs by encouraging them to see the relevance and importance of their education while providing a mature environment for learning and discussion. The school's format reflects the characteristics of educational environments that benefit adult learners, including open discussion, self-directed learning, and personal accountability.

Many traditional adult education programs lack the flexibility that adult learners require to become successful. Across the country, adult education programs typically follow a process-oriented model that requires adults to learn at the pace established by the program. These programs do not meet the needs of adults who must balance work, life, and family concerns with their learning goals.

The Excel Center's academic environment is designed to 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 freedom to explore these goals, students will determine the pace and, to some degree, content (depending on their career interests) of their academic program. 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 Excel Center's culture: each student has, at some point in his/her life, recognized the challenges of life without a high school diploma and has made the choice to return to school. The model is designed around students who have recognized the need for an education and have demonstrated a certain level of motivation to continue

their education, and will provide supports to students to continue in this approach by helping 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 he or she can be successful in post-secondary environments by enrolling in dual credit courses. These supports are intended to develop each student's sense of self-efficacy in achieving his or her educational and career goals.

The Excel Center staff will work with a population whose challenges are different from is typically experienced a traditional high school setting. Thus, staff development will often focus on the ways in which staff can interact with students in productive ways. A critical component of The Excel Center's success is the hiring process, wherein teachers are selected, in part, based upon their emotional intelligence and ability to build relationships with students. This need is even more particular with adults, who respond better in a learning environment that respects the perspectives, experiences, and views adult students bring to the classroom.

As a part of new staff development, staff will learn more about the population they will be serving in The Excel Center. In a group setting, staff will watch videos of students' communication styles, and examine case studies of student barriers. Staff will debrief these experiences, brainstorm ways of working with this student population, and set expectations for their work in the school in the future. Administrators from GEI and the other Excel Center sites will also assist new staff in learning how to work with this population and to share ideas and best practices on means of promoting student engagement and success. This process will be repeated at the beginning of the new academic year in July, allowing staff to recalibrate and prepare for a new academic year.

Adult learners benefit from strong relationships with peers and staff which provide consistent support for education, strengthen motivation to achieve goals, and build resiliency to overcome obstacles. The core of The Excel Center model is fixed-time classes with face-to-face instruction. Classes meet in extended blocks, permitting teachers to establish relationships of trust, relevance, and respect with students. Life coaches are a critical part of establishing the school culture within The Excel Center. Coaches will help students address life barriers and issues that prevent students from being successful in school. The Excel Center's coaches will help keep students engaged and motivated in the school. Coaches will work with a cohort of students to identify potential obstacles to their education, whether short-term (such as housing and childcare) or long-term (including student self-efficacy and self-confidence).

A Typical Student's Day

Each Excel Center student has a unique schedule and course progression. To highlight the variety of ways that different students can access The Excel Center's resources, two sample schedules are included for two students with different life situations.

**Sample Student Schedule 1**

| Class Period | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| **Period 1** | American Studies A | American Studies A | American Studies A | American Studies A | *Off* |
| **Period 2** | | | | | |
| *Break* | *Lunch* | *Lunch* | *Lunch* | *Lunch* | |
| **Period 3** | Financial Foundations | Financial Foundations | Financial Foundations | Financial Foundations | Tutoring and Credit Recovery |
| **Period 4** | Math B | Math B | Math B | Math B | |
| *Break* | *Off* | *Off* | *Off* | *Off* | *Off* |
| **Period 5** | | | | | |
| **Period 6** | | | | | |
| Child Care | *Not needed* | *Not Needed* | *Not Needed* | *Not Needed* | *Not Needed* |

This student attends school from 9:00am until 4:00pm each day. This student's schedule includes classes in American Studies A, Financial Foundations and Math B (remediation). The student also works with tutors and completes online credit recovery classes on Fridays.

**Sample Student Schedule 2**

| Class Period | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| **Period 1** | | | | | *Off* |
| **Period 2** | English 2 | English 2 | English 2 | English 2 | |
| *Break* | *Lunch* | *Lunch* | *Lunch* | *Lunch* | |
| **Period 3** | Math A | Math A | Math A | Math A | |
| **Period 4** | *Off* | *Off* | *Off* | *Off* | |
| *Break* | | | | | |
| **Period 5** | Health | Health | Health | Health | |
| **Period 6** | | | | | |
| Child Care | 10:30am - 2:30pm | 10:30am - 2:30pm | 10:30am - 2:30pm | 10:30am - 2:30pm | *Not needed* |

This schedule accommodates a student with a young child who needs to use the drop-in center for childcare while she attends classes. During this time, the student is able to attend basic skills instruction (English 2 and Math A). Since her mother keeps her child after work, the student returns to The Excel Center to take an online Health class, and goes home at 6:30pm. On Fridays she comes school for tutoring as needed.

<u>A Typical Teacher's Day</u>

- A teacher will arrive at school around 8:00am. S/He reviews plans for the day's classes until class begins at 9:00am.
- From 9:00am to 12:15pm the teacher leads an Algebra IA course.
- The teacher takes a 45-minute lunch break.
- At 1:00pm, the teacher leads a Math A course which lasts until 2:30pm.
- The teacher then instructs a Financial Foundations class from 2:45pm to 4:00pm.

- From 4:00pm until 5:00pm, the teacher reviews the day's work, grades student work, and enters data into the student information system, prepares for tomorrow's courses, and is available to provide extra support to students.

**Supplemental Programming**

Summer School

The Excel Center's calendar operates on a balanced academic calendar with minimal breaks, including a three-week break during the summer. As such, The Excel Center will not operate a traditional summer school program.

Extra- and Co-Curricular Activities

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 will encourage students to take an active role within the school community. Students will be encouraged to form a student council. Furthermore, students will be encouraged to be the change that they would like to see in The Excel Center. The school will do all that it can to empower students to form their own groups with the approval of the School Director. For example, one Excel Center had a number of students interested in pursuing careers within their church community and formed a bible discussion group. Another Excel Center had a larger population of single fathers in the school and wanted to create a men's group to discuss some of the issues that they faced as single fathers and being a positive role model for their sons and daughters. In another instance, a group of students wanted to organize a holiday potluck luncheon. The only requirement for students organizing a new event or group is that the event or group be open to all students.

Addressing Mental, Emotional and Social Development and Health

As previously stated, one of the three main pillars of The Excel Center's education plan is a coaching platform designed to address barriers that impede students' continued educational success. The Excel Center's coaching platform acts as a comprehensive guidance program for all students and is central to providing supportive relationships that enable students to manage work, life, and family concerns as they achieve their educational goals.

When students enroll in The Excel Center, they will be assigned to a Coach. Coaches take on the role of a traditional guidance counselor by working with students to identify goals, schedule them in classes that help them meet both their academic and personal goals, and also act as a resource for counseling, as needed. Coaches monitor student attendance and academic progress, identify students who may be at risk of failure or dropping out, and work proactively to secure needed community resources.

However, coaching in The Excel Center model is designed to be more comprehensive than a traditional guidance program, by addressing the life barriers and issues that prevent students from being academically successful. Coaches work strategically to identify the non-academic barriers that keep the vast majority of adults from reengaging in school as well as the issues that led them to drop out of school in the first place. Coaches work with students to identify potential barriers to students' continued education, whether short-term barriers (such as food assistance or transportation) or long-term challenges (including student self-efficacy and self-confidence). The relationships that coaches create with each student is a critical factor in student success; those relationships provide security, confidence, and encouragement for students to continue when the work becomes difficult and life barriers become difficult to manage.

In some instances, these barriers may include medical needs concerning a student's physical, emotional, or mental health. In order to ensure the wellbeing of all students, The Excel Center will utilize its relationships with local health service providers to provide referrals to these health service providers, as necessary. Life Coaches are additionally charged with assisting students in finding any other needed services where partnerships may not already be established.

As appropriate, students will be provided with medical support and services, pursuant to their 504 Plan.

Other Student-Focused Activities

A primary student-focused program that is integral to educational plans is the drop-in child care center. This program not only gives students with children the opportunity to focus on their education by providing on-site child care, but also gives their children a head start in their own education.

The Excel Center also provides transportation assistance to students, as needed, in the form of free bus passes. These two programs have been critical to providing adult high school students the necessary support to complete their high school education.

**Special Populations and At-Risk Students**

Plan to Serve Students with Special Needs

The Excel Center's unique curricular format, instructional methods, and class structure provide ample support for special student populations, meeting students "where they are." Because academically low-achieving students, students with disabilities, and other at-risk students have higher rates of dropping out of high school than the general population,[16] it is expected that many of The Excel Center's students will have special needs.

To accommodate the range of student skill levels, aptitudes and backgrounds, The Excel Center offers flexible coursework (e.g., 8-week terms, small group instruction, remediation, certification courses) and individualized attention. The goal is to give each student a realistic and attainable path to educational success and sustainable employment. Each student creates an education plan with their life coach. This structure allows students with special needs to receive appropriate support, with their own Individualized Education Programs (IEPs) or Section 504 plans. It also provides specialized instruction and support for English Language Learners and gifted students, as well as remediation to raise student skills to a high school level. Coaches provide academic and non-academic support for each individual.

The self-paced nature of the program serves both those with learning disabilities or limited English proficiency who may need to take one class at a time and those who are gifted and want to accelerate through the program in the least amount of time possible. 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. The Excel Center maintains high expectations for all of its students in order to adequately prepare them for successful careers after graduation or transitions into postsecondary education.

[16] National Center on Secondary Education and Training (2014). *Dropout and graduation frequently asked questions*. Retrieved from http://www.ncset.org/topics/dropout/faqs.asp?topic=36

Students with Mild, Moderate, and Severe Disabilities

*Identification and Compliance*

The Excel Center will comply with IDEA Child Find activities for all students who enroll, including identifying and providing appropriate special education services in accordance with applicable Indiana laws and regulations and IDEA. The Excel Center 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 (name, contact information, date of birth, previous schools attended, etc.), students are asked to identify whether or not they have ever received special education services. If a student indicates that he or she has previously received services, then the school's registrar and special education staff will contact the student's previous school(s) to receive copies of the student's IEPs. In addition to these preliminary efforts, students are again asked whether they have received special education services during the iExcel. Students will meet with a Teacher of Record (TOR) or other special education staff person to discuss any services that may have been received previously. The Excel Center staff will initiate the Child Find process for all students who self-identify as needing special education services or who staff feel may have previously received or be in need of services.

All general education curriculum and school activities will be made available to students receiving special education services, unless otherwise noted in the student's IEP. Students receiving services will spend a majority of their instructional day participating in fixed-length classes alongside the general student population. The remainder of the day they may use supplementary services as indicated in their IEP or Section 504 plan. Based on student need, individualized or one-on-one instruction may also be provided. The instructor-to-student ratio allows for every student (regardless of special education status) to enjoy an increased level of attention from his or her instructor and coach. This allows for placement of every special education student into the least restrictive environment. All classes are inclusionary, and none are comprised solely of special education students; however, the school has the ability to provide more intense individualized services, if necessary.

Because students will all have flexible calendars based upon their unique situation, it will be common to adjust plans to accommodate students with identified eligible disabilities. Staff will work with students to establish what academic schedules are appropriate for their unique needs and make that work. Some students will be able to attend one classroom session and then spend the rest of the day in General Skills Lab where they will work with other students and facilitators. Other students will be eligible to participate in online directed course content, where they can work at their own pace, again with the support of facilitators as needed.

*Continuum of Services*

Life coaches will create individualized learning plans to accomplish their learning goals for all Excel Center students – including those with special education needs. Each student's life coach will help the student manage his/her learning plan and will check in with the student to monitor his/her progress. Students with special education needs will also be supported by an IEP or 504 plan and specialized learning environments structured to fit their unique needs. The TOR is responsible for ensuring that students' IEPs and Section 504 plans are being implemented with fidelity. Each student will receive individualized academic and behavioral planning and services in their least restrictive environment (LRE). To accommodate the range of students' skill levels, aptitudes, and backgrounds, The Excel Center will offer flexible coursework (e.g., 8 week terms, small group instruction, remediation, certification courses) and individualized attention. The Excel Center's goal is to give each student a realistic and attainable path to educational success and sustainable employment.

Students with special needs will have a variety of other services available to them, including:

- Speech and language therapy;
- Occupational therapy;
- Physical therapy;
- A dedicated Teacher of Record: The Excel Center's special education teachers will be certified to teach special education and will demonstrate understanding of the unique needs of students with disabilities and special needs. Meeting each student where he or she is, the TOR will meet regularly with students to facilitate their learning and monitor progress against IEP goals and objectives. The TOR will use a student-centered approach to tailor learning/service strategies, and will be expected to employ creativity and innovation in his/her educational approaches. To that end, TORs will receive ongoing professional development related to best instructional practices to use when working with students with disabilities. 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. All accommodations for students with disabilities will be put in place to allow students better access to the general education classroom and curriculum.
- Coaching: Trained and compassionate professionals will be hired as The Excel Center's life coaches. These coaches will work with each student to address life barriers and issues that may have caused their decision to drop out of school, and to maximize their potential of being successful in their educational program at The Excel Center. The primary goal of a coach is to keep students engaged, motivated, and constantly moving toward completion of their credits to earn their high school diploma and prepare for postsecondary education or the workforce. They will work with students to identify potential short-term barriers – such as housing, child care, transportation, etc. – as well as long-standing issues, such as a lack of self-confidence. Coaches and TORs will work closely as a team to facilitate learning plans, activities, and services for all students, including those with an IEP or Section 504 Plan.
- Transition Services. As they earn their high school diploma, students at The Excel Center will be provided the chance to learn social skills and job skills needed for the 21st century workplace. Clearly identified transitional services and activities will play a vital role in each student's IEP. The comprehensive transition plan will include educational programming and work-related training that specifically addresses each student's needs as they prepare to become productive members of society. This intentional planning incorporates transition assessments to identify student interests and aptitudes, and to provide supports that address their postsecondary education or employment goals. The TOR will also work closely with students to access needed supports and assistance after graduating from The Excel Center, including such services as offered by the state's Vocational Rehabilitation Services. Vocational Rehabilitation will provide students with any services the student needs to overcome barriers they may have to employment. Vocational Rehabilitation Services may include internships, work skill training, college assistance, job placement or even soft skill training. Vocational Rehabilitation Services specifically assists individuals with disabilities as they seek employment. Transition services may also include college tours, internship programs, and work skill development, focusing on the individual needs of those with disabilities.

*Evaluating and Monitoring Progress*
In general, educational evaluations will be completed to assess any areas of educational need. These evaluations are used to help the IEP Team 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. Guardian and/or student must provide written consent for the evaluation to begin.

Procedures after a request has been made:

1. Complete Appropriate forms in IndianaIEP
2. Contact the 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 School Psychologist
5. Work with School Psychologist to set up times for testing
6. After evaluation testing is complete and 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 Teacher
- Contracted School Psychologist[17]
- Speech/Language Pathologist
- Coach
- Related Service Providers
- Guardian
- Student

Licensed special education staff will write IEPs for students with special education needs and will be responsible for notifying instructors and coaches of their specialized plan. Students with disabilities will be placed in the least restrictive environment possible and will be able to access the accommodations that best suit their abilities, whether online, one-on-one, or within a classroom setting. LRE placement is a case conference committee decision and will be based on the student's present levels of performance (classroom data, standardized testing data and any other relevant factors) and IEP goals. Consideration will always be given to the LRE placement for each student. Due to the structure of The Excel Center, students with disabilities will be afforded small class sizes, preferential seating and access to digital text. Accessibility options with online curriculum will allow students to access the same learning material as other students and work at their own pace. Special education staff will work with instructors to ensure

[17] The School Psychologist will always attend initial/reevaluation conferences.

that students receive appropriate services that will enable them to stay on track to graduate. Students can also access a variety of accommodations based on the needs outlined in their IEPs. In the rare cases in which The Excel Center cannot serve as a student's LRE, the Case Conference Committee (CCC) will determine a plan to ensure the student's success is provided in an alternative environment. Any determination to change a student's placement is a decision that will be reached by the CCC. 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 online curriculum with support of a TOR. Each IEP will be created with the individual student in mind, and each student will play an active role in the implementation of his/her IEP. Should the IEP prove ineffective for the student, the CCC will reconvene and develop an alternate plan to better provide access to the learning curriculum.

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

In the process of earning their high school diploma, students at The Excel Center learn social skills and job skills needed for the 21st century workplace. Clearly identified transitional services and activities are part of each IEP and Section 504 plan, including assessments to identify student interests and aptitudes as well as necessary post-secondary or workplace supports that may be needed. The TOR will also connect students to needed supports and assistance after graduating high school, including vocational rehabilitation as applicable. Eligible students may utilize these services through GCSI if they choose to do so. Through vocational rehabilitation, students have access to college assistance, internships, work experience, job coaches, and job placement.

*Qualified Staff*
The Excel Centers' TORs and Paraprofessionals are trained on all applicable policies, procedures, and guidelines set forth by Indiana laws and regulations, IDEA, Section 504 of the Rehabilitation Act, and ADA. The TOR should have a special education license and will ideally have special education teaching experience. Paraprofessionals are hired on an "as needed" basis, based on the number of students that are enrolled in the school and have been identified for special education services.

Each school will have at least one special education coordinator. This person will hold an appropriate license to serve students across all disability categories and will serve as TOR for all students with an IEP. In addition, there may also be additional staff (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.

The Resource Specialists will provide high quality special education services to students. In addition, TORs will also be responsible for coordinating transition services and related services. Any paraprofessionals hired will be highly trained and closely supervised by special education staff.
The Excel Center will contract for services of speech-language therapy, physical therapy, occupational therapy, psychological services, and other related services as indicated in a student's IEP or 504 Plan, and as needed according to the needs of students.

*Examples of Meeting Diverse Needs*
The structure of The Excel Center's academic plan is to provide the appropriate instructional methods to meet each student's unique needs by having teachers differentiate instruction for all students in all classrooms. This structure will allow students with special educational needs to receive appropriate support, whether they have an IEP or Section 504 plan. In addition to the remedial courses, students with disabilities will spend the majority of their instructional day participating in fixed-length classes alongside the general student population. Students may utilize supplementary services and/or accommodations as indicated in their IEP or Section 504 plan. Examples of these services in core subjects may include additional small group or individual tutoring, the use of speech to text conversion devices, regular use of calculators, the use of vertical text sets and/or additional time on assessments. The Excel Center's special education model will utilize full inclusion for students with IEPs. In some instances, a paraprofessional will push into the class to assist students, and all students will have access to tutoring sessions on Fridays and before and after school.

Teachers 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 upon student need, differentiation strategies employed in The Excel Center'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 provide students with 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 continue to interact with complex disciplinary texts, practicing vocabulary acquisition and improving reading comprehension skills. The gradual release of responsibility instructional strategy described above includes a great deal of cooperative group work, and teachers must select strategic grouping techniques to maximize instructional time and to 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. Ensuring that differentiated curriculum and instruction remain aligned to standards, teachers author parallel tasks, tasks that are aligned to the content of the standard but that utilize a slightly simplified process.

<u>English Language Learners</u>
*Identification*
The Excel Center anticipates that some students will have a native language other than English. English Language Learners (ELL) are first identified during enrollment. Students will fill out a Home Language Survey (HLS) in which they will self-disclose what language(s) they speak at home other than English. Those students who indicate they speak a language other than English in the home will take the WIDA Assessment to indicate the degree to which they need assistance in English. WIDA Assessments will be taken annually, with re-tests at regular intervals throughout the school year to determine the level of support students require.

*Instructional Programs, Practices, and Strategies*
ELL students with Lexile scores below 1000 will be enrolled in Competency English courses and progress through basic English skills instruction as they gain mastery in English education. These students will access System 44, a proven foundational reading program developed by Scholastic. System 44 was selected because it is research based and aligned with the Read 180 program that is used for remedial reading with general education students to help them develop the reading skills necessary to enter into high school-level courses. Although these systems are currently in use at The Excel Center, it should be

noted that because new resources are frequently released, GEI is conducting an analysis of the current success rates with these programs of students enrolled at The Excel Centers are comparing them to the outcomes of other similar programs to ensure that The Excel Center's instructional resources are best aligned to meeting students' needs.

School staff will connect ELL students with the resources they need to learn and remain engaged in schoolwork. Where possible, some online content will be available for Spanish speakers, and there will be bilingual staff available to assist ELL students with accessing the school's resources. The Excel Center will contract with outside providers in order to meet the educational needs of any second-language students who do not speak Spanish. Additional resources utilized by ELL students include System 44, bilingual dictionaries, Scholastic READ 180 Lbooks, and the Read & Write Gold program, which provides reading and writing supports. System 44 is a foundational reading program for individuals who struggle with reading which has been proven effective to help students master the foundational reading skills required for education and career success through explicit instruction in phonics, comprehension, and writing.

Teachers whose students include English learners participate in monthly meetings in which teachers plan explicitly for content adaptations, building background knowledge, creating comprehensible explanations and scaffolded learning experiences, and providing opportunities for review prior to mastery assessments.

*Assessing and Monitoring Progress*
The Excel Center will have high expectations for ELL student achievement and continuously monitor ELL student progress (e.g., student work, formal and informal assessments, test results), and systematically adjusts instructional planning based on a wide variety of evidence and data. Teachers will support and learn from each other in a way that recognizes the interdependency of language proficiency and content instruction. GEI provides professional learning opportunities to increase teachers' capacity to enrich language development and academic concepts and skills.

*Qualified Staff*
Students enter The Excel Center with diverse needs, including their educational background, language minority status, cognitive ability, age, confidence, and motivation. Student success in the educational program requires teachers to plan daily for differentiation in the classroom, meeting student needs while delivering high-quality, standards-based instruction. Scientifically based research supports the teacher modeling and metacognitive conversations that are central to the gradual release of responsibility model.[18] Meeting the needs of ELL students requires additional training beyond classroom differentiated instruction, and teachers meet monthly and participate in trainings which provide skills and resources to best meet the needs of ELL students and increase their confidence and language acquisition while learning essential content. All ELL teachers will participate in weekly data analysis meetings during which they will learn data analysis techniques. Curriculum analysis and horizontal and vertical articulation of curriculum and assessments occurs throughout the school year as part of data analysis work.

Integrated into each professional development day are modules that assist staff in teaching students with disabilities and ELL students. Additional staff development days will be dedicated to ensuring that

[18] Fisher, D., & Frey, N. (2008). *Better learning through structured teaching: A framework for the gradual release of responsibility*. ASCD.

all appropriate staff understand all federal laws and regulations related to students with disabilities and ELL 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 also be trained on the WIDA test and WIDA test standards to track student proficiency in English.

Students Performing Below Grade Level

Many students will arrive at The Excel Center with skill levels far below high school-level work and in need of significant remediation. By definition, almost all of the students may be "below grade level," whether dropping out of school left a student far behind his or her graduation cohort, or time away from school has left a student "out of practice" with academic material. The Excel Center staff will identify the learning needs of students. Diagnostic assessments taken at intake in The Excel Center network reveal that 70% of students test below a sixth grade skill level in math, and 45% score below a sixth grade level in reading.

The Excel Center utilizes Response to Instruction (RTI), a multi-step approach to providing services and interventions to students who struggle with learning at increasing levels of intensity. This involves determining whether students are learning and progressing optimally in areas of academics, social interactions, emotional growth, and behavior. Identification of the level of intervention needed by each student is based on standardized assessments, such as the Reading Inventory (RI) for reading and the Excel-Designed Math Assessment (EDMA), a customized math assessment developed by GEI.

Tier I interventions provide evidence-based, differentiated instruction to meet the needs of all students. Teachers ensure that 80-90% of all students are academically successful with universal interventions. If fewer than 80% of students are successfully mastering the course content, GEI will evaluate the core curriculum and instructional practices.

Students who are demonstrating below 80% proficiency of standards with core instruction alone are prioritized for Tier II intervention. Teachers provide small group supplemental instruction and other additional interventions as needed to this population which generally makes up 5-10% of students, monitoring their academic progress more closely than Tier I students.

Tier III interventions are reserved for 1-5% of students who require intense interventions. Teachers may need to provide individualized instruction focused on specific skill deficits to these students in addition to core instruction, with increased monitoring of academic progress.

Tier III coursework relies heavily on computer-integrated resources, including System 44 and Read 180 for English 1 & 2 and the EDMA-based Math A & B. Each of these courses provide personal learning progression for students and data on skill development for teachers. These programs are aligned with Indiana College and Career Readiness Academic Standards, ensure students are ready for secondary level coursework, and allow students to earn elective credits.

Continued interventions are offered as long as they contribute to academic progress. If students are unable to demonstrate academic growth through ongoing assessments over two terms, even after extensive intervention, they may be referred to an outside provider for special education testing.

Intellectually Gifted Students

The Excel Center 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. Research indicates that many gifted students drop out of school due to life issues that impeded their economic progress. Reports have shown that for gifted males, reasons for dropping out are related to economic issues and the need to find work, whereas for gifted female students, personal issues are more likely to have been the catalyst for dropping out.[19] In both cases, The Excel Center's coach is a critical support to identify what out-of-school challenges may interfere with that student's educational success to ensure they remain successful in The Excel Center.

In addition to the differentiation provided in every classroom, The Excel Center's core content course progression will allow students who are advanced to pursue dual high school and college credits during their final term of their core content area. Dual credit has been shown to have significant outcomes in improving postsecondary success and high school credit attainment. The Excel Center 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 will offer these opportunities at no cost to students. The Excel Center will absorb the cost of courses to ensure students have the ability to participate in and complete these courses. Leveraging Goodwill's partnership and institutional knowledge in working with Ivy Tech, The Excel Center will be positioned to make strong referrals for students to the college.

**Student Recruitment and Enrollment**

Student Recruitment and Marketing

The Excel Center will be assisted by the marketing staff of GCSI in the development and execution of the school's marketing plan and The Excel Center staff will be responsible for student recruitment for the school.

GCSI has been serving the Central Indiana area since 1930 and will spend considerable time and efforts recruiting student by providing information about The Excel Center through a number of existing community channels:

- *Outreach to current and prospective partner organizations.* Several meetings have been held to fully explain the aim of The Excel Center, its target student population and to seek alignment agreement with partners in education and workforce development, and the public and social services sectors. Meetings will continue as the planning and implementation phases progress. Once approved, information on The Excel Center will be shared with a broader number of organizations throughout targeted communities that work with populations that are unschooled and/or unemployed or underemployed. These partners are often key student referral channels.
- *News media releases.* Information announcing new Excel Center sites will be released via local media and on The Excel Center's website.
- *Public information meetings.* To supplement other tactics, a number of neighborhood-based informational meetings will be announced and held. This will allow direct interaction with prospective students and allow them to meet staff, ask questions and pick up enrollment

[19] Renzulli, J.S. and Park, S. (2002). Giftedness and high school dropouts: Personal, family, and school-related factors. The National Research Center on the Gifted and Talented. Retrieved from https://www.sandiegounified.org/sites/default/files_link/district/files/gate/Giftedness%20and%20High%20School%20Drop%20Outs.pdf

application materials. Target locations for public information meetings will include public libraries and community centers.

- *New website development.* GCSI will provide information on The Excel Center's website. The website will include academic program descriptions, enrollment information, application forms and frequently asked questions.
- *Social media.* Facebook, Twitter, and email blasts will be utilized to disseminate information about The Excel Center and upcoming events.
- *Word of mouth.* Since its inception in 2010, strong word of mouth has been the most successful recruitment tool for recruiting student applicants at The Excel Centers. Once individuals began to hear about The Excel Center, interest grew rapidly.

Enrollment Policy

Please see **Attachment 9** for The Excel Center's enrollment policy, which includes admission requirements, GEI's approach to processing enrollment, lottery procedures, and policies and procedures for student waiting lists, withdrawals, and re-enrollments.

**Student Discipline**

Discipline Philosophy

Students will have made a conscious choice and effort to enroll in and attend The Excel Center and to reengage in their education. The Excel Center's philosophy regarding student behavior and discipline is that all students – regardless of race, gender, age, background, ability, or any other factor – have the basic right to an education and the opportunity to earn a high school diploma as well as maintaining their basic health, safety and security. The Excel Center expects that all members of the school community conduct themselves in a manner to uphold and maintain these rights. Students or faculty who engage in behaviors that negatively impact students receiving an education or any individual's health or safety will be dismissed from The Excel Center immediately. This philosophy is consistent with The Excel Center's school model, mission and educational philosophy because it places an emphasis on students and enabling them to overcome any and all barriers in order to achieve a high school diploma.

The Excel Center takes discipline very seriously and views suspensions and expulsions as a "last resort" option to ensure a safe and secure school environment. In order to ensure that the school's suspension and expulsion rates remain low and that they are in-line with relevant averages, the school will implement Progressive Discipline Steps (please see **Attachment 10**). These steps are 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.

Discipline Policy

Please see **Attachment 10** for The Excel Center's discipline policy.

**Parents and Community**

Existing School Options

Although many dropouts would like to continue their education, they face limited options to achieve their goals. Unfortunately, there are few options for high school dropouts to continue their education: adult education programs struggle to meet community demand, and adults without a high school diploma often lack the support and encouragement necessary to establish, create, and achieve their goals. GED tests are the most common avenue for adult education, and studies have challenged the long-term benefits of earning a GED. Economists have argued that the wage benefits earned by GED

recipients are largely explained by GED earners' higher initial skills.[20] However, other reports have shown strong psychological and social benefits of earning a GED, especially when a GED is used to prepare students for post-secondary education. Unfortunately, most people who earn a GED struggle at the post-secondary level: although 65% of GED test takers plan on attending college, between 30 and 35 percent are able to attend. Ultimately, only five to ten percent of GED recipients are able to finish their first year of college.[21]

The Excel Center model is a first-of-its-kind adult high school which creates an opportunity for those who previously dropped out of high school to reengage in their education and earn a full, state-recognized high school diploma. The Excel Center was the first adult high school in Indiana and there are no other similar school options for adults in any of the proposed locations for The Excel Center.

Sufficient Demand

In order to determine the feasibility of opening The Excel Center in new communities, GEI first assessed whether evidence suggests there is a significant and sustainable level of need in communities (i.e., Are there a significant number of individuals without a high school diploma? Do area education trends suggest that the emerging workforce will continue to increase the number of individuals without a high school diploma, in the absence of an adult high school option?) In addition to the sheer number of individuals who may benefit from The Excel Center, GEI further assessed how the local workforce fares in the current state of the economy (i.e., Does the state of the current workforce indicate that individuals will benefit from earning a high school diploma?).

The table below depicts the number of adults without a high school diploma in each of GEI's targeted communities, in addition to the typical annual number of dropouts from area schools, the local poverty rate[22], and earnings gap.[23] Based on the data represented in this table, GEI has determined that these targeted communities have sufficient demand for The Excel Center's operation.

| City | Total Adults without a High School Diploma | Adults Ages 18-34 without a High School Diploma | Annual Number of Dropouts | Poverty Rate | Earnings Gap |
|---|---|---|---|---|---|
| Muncie | 6,743 | 2,264 | 208 | 32% | $8,620 |
| Marion | 3,831 | 1,034 | 69 | 31% | $8,378 |
| Columbus | 2,988 | 913 | 151 | 29% | $7,778 |
| Bloomington | 3,225 | 1,242 | 146 | 40% | $4,842 |

Parent Engagement

It is unlikely that many parents of students will be involved in the school for the main reason that The Excel Center is 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 no longer live with parents or guardians, and many students may be taking care of their own children. The school has been

[20] Heckman, J. and LaFontaine (2005). Bias Corrected Estimates of GED Returns. Retrieved from http://jenni.uchicago.edu/ged_umputation.

[21] Harris, L., & Ganzglass, E. (2008). *Creating Postsecondary Pathways to Good Jobs for Young High School Dropouts: The Possibilities and the Challenges* Washington, DC: Center for American Progress. Retrieved from http://www.clasp.org/admin/site/publications/files/0438.pdf

[22] The Poverty Rate is the percentage of adults without a high school diploma living in poverty.

[23] The Earnings Gap is the difference in wages between adults without a high school diploma and adults with a high school diploma.

designed with the expectation that most students live on their own and are more likely to be responsible for their own lives.

In cases where students are still below age 18, Excel Center staff and coaches make every effort to work with parents in the same focus as traditional high schools. Coaches are often the line of communication between the school and families. Coaches 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 primarily liaison between 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. Where necessary, GCSI's resources will be used to help address any issues or barriers to family well-being that affect a student's ability to be successful in school. Most often, these barriers will relate to providing care for young children of students.

Community Resources

The Excel Center provides free drop-in child care resources to any student who is a parent or legal guardian of a child 6 weeks to 12 years of age. Transportation assistance is also offered in the form of free bus passes in cases where transportation issues may prevent student attendance. Life coaches are very resourceful and quickly connect with community agencies on behalf of their students, no matter what barriers to family well-being or student success arise.

As an affiliate of GCSI, Excel Center staff will be able to work with workforce development staff who run programs serving ex-offenders, at-risk youth, first-time mothers, and other underserved populations to find solutions to non-academic challenges. Additionally, The Excel Centers will be able to build upon GCSI-established partnerships with local businesses for job training and placement, and access social service organizations to provide housing, counseling, legal aid, and other needs.

Community Support

The Excel Center has working relationships with a number of partner organizations that are critical to the success of the school.

GEI's most significant partner is its parent organization, GCSI. GCSI supports GEI by providing substantial back office support for school operations and long-term planning, allowing GEI staff to focus most of their efforts on providing quality educational opportunities for its students. Goodwill supports GEI with a variety of in-kind support services, including:

- Use and maintenance of Goodwill facilities;
- Administrative support through accounting, IT services, recruitment, and HR practices;
- Development and fundraising support, as well as capital support through GCSI's Foundation;
- Students who become pregnant with their first child may enroll in the Nurse-Family Partnership, a home visiting program operated by GCSI that builds parenting and life skills among first-time mothers and their children;
- Some Excel Center students have been employees of GCSI, or family members of students have been able to find employment through GCSI; and
- Connecting students and their families to resources in the community. GCSI maintains solid working relationships with a number of community-based organizations, not-for-profits, and public organizations.

As the statewide community college network, Ivy Tech Community College is the school's primary educational partner. The Excel Center will build on Ivy Tech's dual credit course offerings for high school students. In the dual credit arrangement, an Excel Center student is dual-enrolled as both an Excel Center and an Ivy Tech student, and completion of an Ivy Tech course grants both high school and post-secondary credit. The Excel Center will pay the tuition costs for Excel Center students to take Ivy Tech courses.

Several other community partners have established working relationships with GEI to support and supplement services made available to students. These relationships increase GEI's ability to respond to the needs of its students by accessing the resources and experience of community partners. Because GEI has already established partnerships with the following organizations, students at The Excel Center will have the opportunity to access these organizations' resources:

| Name of Organization | Nature of the partnership with the school |
|---|---|
| Goodwill Industries of Central and Southern Indiana, Inc. | Administrative support; use and maintenance of facilities |
| TalentSource | Job placement for students |
| Nurse Family Partnership | Referral source for students; support service for students who are first time mothers |
| Ivy Tech Community College | Dual Credit and industry certification courses |
| IUPUI | Dual Credit and industry certification courses; provides The Excel Center with Work Study tutors |
| Wishard Advantage | Refers Excel Center students for free medical care based on income |
| IU Health (Garden on the Go) | Provide students with access to fresh produce at an affordable price |
| Peace Learning Center | Provides camping and team building activities for Excel Center students |
| Health Net | Provides Excel Center students for discounted medical care and insurance based on income |
| Neighborhood Christian Legal Clinic | Provides Excel Center students with legal advice |
| Marion County Health Department | Provides classes such as AIDS awareness and STD awareness |
| Health and Hospital Corp | Provides students with job shadowing opportunities and internships |
| IU School of Optometry | Provides students with job shadowing opportunities and internships |
| Dress for Success | Provides clothes for students who have landed job interviews |
| St. Vincent De Paul Food Pantry | Provides students with food and furniture |

| | |
|---|---|
| Old National Bank & INHP | Provides students with free financial management classes |
| St. Vincent<br>S MICI-AHEC | Provides students with tutoring in math and science |
| Mary Rigg Neighborhood Center | Refers students to The Excel Center |
| Fletcher Place Community Center | Refers students to The Excel Center |
| BACI Burmese American Community Institute | Refers students to The Excel Center |
| Goodwin Center | Refers students to The Excel Center |
| Southport Library | Refers students to The Excel Center |
| Concord Neighborhood Center | Refers students to The Excel Center |
| Community Hospital South | Refers students to The Excel Center |
| Muslim Community Center | Refers students to The Excel Center |
| Shepherd Community Center | Refers students to The Excel Center |
| St. Francis Alliance | Refers students to The Excel Center |
| Barrington Health Center | Refers students to The Excel Center |

With the assistance of GCSI, which already has a strong foothold in Central and Southern Indiana, The Excel Center will continue to develop additional partnerships in each of the communities in which it locates. GEI staff have conducted meetings with Muncie Community Schools to begin sharing information about The Excel Center and developing partnerships. To date, The Excel Center has made significant strides in engaging with stakeholders in bringing The Excel Center to new communities. In addition to The Excel Center having much support from state legislators, community interest in The Excel Center has grown through conversations with local leaders as members of the applicant team have shared its success. GEI staff have held meetings with Muncie Community Schools, the Mayor of Muncie, the Muncie Housing Authority, Muncie NAACP, and a number of individuals that represent organizations such as the BY5 Coalition and the United Way of Delaware County.

Please refer to **Attachment 11** for evidence of demand from the community and letters of support.

**Performance Management**

Performance Goals

To support student progress, The Excel Center will create a supportive environment that promotes flexible and individualized learning while adult learners manage the various demands and challenges of work and life. GEI anticipates that The Excel Centers located in Muncie, Marion, Columbus, and Bloomington will be held to the same performance standards as all other GEI-operated Excel Centers in ICSB's portfolio. The anticipated student population faces significant academic and non-academic challenges. School-specific goals mirror the particular challenges of working with this target population. Due to the uniqueness of The Excel Center model, the Indiana State Board of Education (SBOE) has approved alternative accountability metrics in order to hold The Excel Center accountable to high performance standards.

The table, below, outlines the academic performance goals of the school.

| Academic Performance Goal | Measure |
|---|---|
| The Excel Center will enable students who have dropped out of school or who are at high risk of dropping out to earn a high school diploma. | The school will have at least a 70% graduation rate (as measured by SBOE's approved modified, non-cohort-based graduation rate*) |
| Students at The Excel Center will meet the same rigorous standards for achievement and high school graduation as students in a traditional high school setting. | At least 90% of all graduates will have passed all mandatory state assessments, graduating without a waiver |
| Students who graduate from The Excel Center will demonstrate the ability to succeed in post-secondary academic environments. | At least 80% of The Excel Center's graduates will graduate having either earned college credit or an industrial certification |

Assessments

The Excel Center will administer regular testing to assess student learning needs and monitor academic growth, beginning with administering baseline placement assessments upon enrollment. Placement assessments in humanities include the RI and the Phonics Inventory (PI) for students whose Lexile measure is below 600; Placement assessments in mathematics include the GEI-created EDMA. The WIDA will also be administered to ELL students to assess the need for English language services.

Course placement will be determined based on these assessments and a review of previous high school transcripts. Each student's education plan will detail any basic skills development that should take place in order for students to perform at or above a high school level. For those who are engaged in remedial work, assessments will be made each term to determine student progress. For those already taking high school-level coursework, students will focus on the ECAs required for graduation, just as traditional high school students do.

Students with dual enrollment in Ivy Tech or who are planning enrollment at other post-secondary institutions, must pass the ACCUPLACER assessment test. Students will be able to take the test as many times as required until they pass the test, and they will elect the time when they are able to take the entrance test.

Data Collection and Analysis

All Excel Center teachers participate in weekly data analysis meetings and learn data analysis techniques during these weekly meetings; curriculum analysis and horizontal and vertical articulation of curriculum and assessments occurs throughout the school year as part of data analysis work.

GEI staff will be available to answer questions related to school performance across the entire Excel Center network, comparing performance across locations, and doing deep analysis into why certain schools perform better than others or suggesting ways to improve performance among special student populations. The summary results of these reports will be shared with every school in The Excel Center network, giving school leaders insights on where high-performing best practices may be found.

The Excel Center will receive data services to provide advanced analytics on school performance. The data warehouse used by all Excel Centers equips the school with an increased capacity to analyze data and drive instruction to fulfill the school's mission. The Excel Center's data warehouse draws upon the data collected within The Excel Center's student information system database, presenting that data via dashboards and ad-hoc reports that provide additional insights to patterns, indicators, making it easier

for teachers and the school leader to make data-informed adjustments to the school's academic program. The dashboards provide an easy-to-follow presentation of current performance.

The data aggregation and analysis is performed by Excel Center teachers and school personnel to meet the specific needs of The Excel Center model. Data analysis within The Excel Centers have been used to identify which students were in danger of not passing classes, assisting teachers and support staff to reallocate resources to ensure that students passed classes.

Poor results on interim assessments will help instructors re-evaluate the student's lesson plans and suggest alternative learning methods address subjects or areas of concern. The curriculum used in The Excel Center has proven effective with adult populations; students can make consistent progress to earning a high school diploma in each of the courses the school offers. Consequently, poor performance in one school will largely come from a poor implementation of the curriculum the school uses. It is a key priority of The Excel Center's professional development plan to equip school staff to use and analyze data to improve instruction.

It is a key priority of The Excel Center's professional development plan to equip school staff to use and analyze data to improve instruction. Through implementing the RISE Evaluation and Development System, school instructors will use the framework related to data management as a part of the school's plan to improve educational practice. GEI staff will establish trainings during which teachers will be encouraged to use assessment data to plan their curriculum (RISE competency 1.1) and for teachers to track student data and analyze progress (1.5). Their use of data factors into their annual evaluation and their development plans to improve their instruction.

Each Excel Center site conducts data reviews on a weekly basis, and GEI conducts reviews of school performance at least every eight weeks. These formal data review meetings include GEI's administrative team and the site directors from each location. The primary focus is to equip school leaders to understand and interpret their performance data, and provide deeper context for their results from the past eight weeks. At the end of each 8-week term, School Directors 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

School Directors explain their performance for the past eight weeks in each of these indicator areas. They explain the factors that led to their current level of performance. Additionally, School Directors explain the steps they will take to address lagging indicators in order to improve the school's performance. These meetings are held with leaders from all of the locations in order to (1) hold School Directors accountable for their results and (2) to encourage the sharing of best practices from GEI leadership and from School Directors' peers in other locations. GEI's leadership team (including its Vice President, Senior Director of The Excel Center Network and Operations, Senior Director of Goodwill Education Initiatives, and Director of Data Services) assess whether locations require additional resources, training or intensive assistance to improve their performance. At the end of the subsequent

eight-week term, School Directors review the prior term's performance and discuss whether the changes made have led to measurable improvement.

Data Management

The collection, analysis, and sharing of data is critical to the success of The Excel Center and its students. The Excel Center's Student Information System (SIS) will be managed on a day-to-day basis by The Excel Center's Manager – Office Administrator. Data entry is the responsibility of all staff members at The Excel Center. Teachers, coaches, and staff are responsible for collecting and entering student data for the school. During the iExcel intake process, a number of staff may be collecting student demographic information, recording transcripts, and organizing student data. As classes are underway, teachers will record attendance and grades and view transcripts through the SIS. Student performance data on assessments will be uploaded to the SIS, where appropriate, and otherwise manually entered by central office staff.

The School Director is primarily responsible for conducting analysis of student data. He/she 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 attainments, both in aggregate and on a per-student basis.
- Identifying Students who are at risk of dropping out of school. The data warehouse automatically generates "At Risk" and "Off Track" student categories. Students who are scoring between 75-80% are labeled "At Risk" and require additional tutoring support, and students scoring below 75% of class mastery are labeled "Off Track" and require significant intervention to complete courses.
- Reports of coaching performance, which identify the academic success for the students who fall within a particular life coach's caseload. These indicators include the total credits earned within the caseload, the average class attendance, the number of students on Academic Concerns (as identified as being either "At Risk" or "Off Track" within a given course), and the number of students who have moved off of Academic Concerns.

Data Training and Support

Additional data analysis by GEI staff will be available to answer questions related to school performance across the entire Excel Center Network, compare performance across locations, do deep analysis into why certain schools perform better than others or suggest ways to improve performance among special student populations. The summary results of these reports will be shared with every school in the Excel Center network, giving School Directors insights on where high-performing best practices may be found.

Corrective Action

Data will be used to monitor progress at the individual student, classroom and school levels. In the event that progress falls short of The Excel Center's goals, an array of strategies will take place to improve student outcomes.

- At the individual level, assessment data will reveal that student progress is not up to proper standards. In these cases, staff will meet to discuss alternate ways of providing supports for students, including increasing the amount of one-on-one attention a student receives; altering the balance of online credit recovery and classroom instruction; working with the coach to identify any potential life barriers that may be impeding academic progress; or altering the pace at which the student is learning.

- At the classroom level, poor performance indicates that instructional staff have not been successful at monitoring and encouraging student growth. If data indicate students are not demonstrating mastery, then the instructor is in need of additional supports to improve skills and work. Corrective actions are a part of the diagnosis as provided by RISE. In the rare instance of extremely poor performance, it may be necessary to move that teacher into another assignment and have staff work on achieving better 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, GEI leadership may deem it necessary to find new school-level leadership.

## Section III: Implementation Plan

### Legal Status and Governing Documents

The following governance documents are provided in **Attachment 12**:

- Evidence of GEI's federal tax-exempt status from the IRS;
- Articles of Incorporation;
- Board Bylaws; and
- Conflict of Interest Policy.

The complete and signed Statement of Assurances form is provided as **Attachment 13**.

### Human Capital

School Staffing Structure

An organizational chart for The Excel Center's first year of operation as well as at full capacity is provided as **Attachment 14**. Also included in this attachment is a high-level organizational chart to illustrate the governance structure of GEI and The Excel Centers.

Please see **Attachment 15** for information relating to projected staffing needs for the entire school network over the next five years.

School Leadership & Staff Hiring, Management, and Evaluation

*Strategy and Timeline for Recruiting and Hiring Teachers*

Hiring the right individuals is a critical success factor for The Excel Center. Staff recruitment will be managed GCSI's Employee and Organizational Development (EOD) division. EOD staff members currently recruit all teachers and staff members for the Indianapolis Metropolitan High School and the existing nine Excel Centers. EOD's Talent Acquisition Team uses Targeted Selection®, a competency-based behavioral interviewing system used across the GCSI organization. EOD's talent acquisition strategies approach assesses applicants' behaviors, motivations, and technical knowledge necessary to accomplish the tasks of the target position.

GCSI's EOD staff are responsible for sourcing and screening candidates for available positions and also verifies the licensing of all of the teaching staff presented as candidates. New staff members are selected after an array of interviews with GCSI staff, GEI administration, and peer interviews. Candidates attend several panel interviews, and the team of staff assess whether that candidate has the required grasp on instruction, fits the organizational culture, and has the emotional intelligence to build relationships with The Excel Center's student population. For management-level positions, GEI administration team members are responsible for making the final decision on hiring. The Excel Center will begin recruiting School Directors upon receiving charter approval. Until each new School Director is selected, the Senior Director of The Excel Center Network and Operations will provide leadership over the school opening process. New School Directors will then participate in the recruiting, hiring, and training process for new teachers.

To hire high quality staff, The Excel Center's initial strategy will be to recruit individuals with a track record of high performance from within The Excel Center network. A description of GEI's strategy for continually developing a high quality pipeline of school leaders is provided in the Governance portion (Head of School and Administrative/Management Team) of Section I (Evidence of Capacity) of this charter application. Over 40% of The Excel Center hires have come from networking, internal

promotions, referrals from community partners, and employee referrals. The Excel Center will also use recruitment strategies such as job posting on the IDOE job bank, GCSI's website, Indeed, LinkedIn, and other job sites, and attending career fairs at local colleges and universities. New staff will be selected after interviews with school leadership and peer panels.

All offers of employment are conditional pending a national background check. All employees are required to work in consort with The Excel Center's basic principle 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.

*Staffing Plan*
All school staff positions are provided in the school organizational chart provided in **Attachment 14**. Specific strategies GEI employs to ensure students are exposed to high quality teachers and staff are further discussed in the Professional Development portion of this section as well as in the Governance portion ("Head of School" and "Administrative/Management Team") of Section I (Evidence of Capacity) of this charter application.

*Performance Evaluation*
The Excel Center network utilizes the RISE teacher evaluation rubric as a means of monitoring the effectiveness of best practices in the classroom. All instructional staff are evaluated at a minimum of five times per school year (at least once per term) with the summative scores from these evaluations determining the instructor's annual raise, bonus, and rehire eligibility for the upcoming school year. School administrators will conduct at least 2 formal observations throughout the school year; informal evaluations will be frequent and based on observations and self-reporting of progress through a term, and will be more frequent during The Excel Center's first year of operation. If a teacher requires a performance improvement plan due to a low score on any of the five 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 Senior Director of The Excel Center Network and Operations will evaluate all School Directors based on their performance on the RISE evaluation rubric, the attainment of school performance goals, and an annual performance and development review. Likewise, teachers will be held accountable by the School Director for their performance under the same guidelines, except their focus will be on student performance within their classrooms. The Lead Teacher will assist in these evaluations, as appropriate.

The RISE evaluation for classroom instruction can be broken up into four key components measuring different aspects of teacher effectiveness. Each Center has the discretion to use professional judgement in how they implement the RISE rubric. It is important that teachers are evaluated using multiple measures, such as instructional observations, student achievement, and school-wide learning measures.

Teachers are also asked to develop Class Learning Objectives and Targeted Learning Objectives to collect student growth data and differentiate instruction to ensure the success of all students. Teachers will be evaluated based on student growth measured at the end of the term through summative assessments such as teacher- designed finals, ECAs, or a certification exam. The instructor will also be evaluated by the school's accountability rating by the IDOE.

As the Senior Director is responsible for ensuring that The Excel Center is running effectively, efficiently, and producing high student performance results, the Vice President of Mission and Education Initiatives.

GEI's Board of Directors has direct oversight of the network and request additional oversight, as needed. The Senior Director bears the responsibility of holding each School Director accountable for the performance of their Excel Center site; the School Director ensures performance of Teachers at that particular school.

*Addressing Performance Concerns*
For those staff members who are placed on an improvement plan, it is the responsibility of the immediate supervisor (Lead Teacher, Lead Coach, School Director, or Senior Director) to provide concrete action steps for the instructor 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 school and network leadership to determine the appropriate next steps, which may include forfeiting their eligibility for rehire.

All employees are required to work in consort with The Excel Center'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.

Whenever leadership or teacher changes can be anticipated, current staff members will train their replacements. Succession plans will be built into the fabric of each Excel Center, encouraging increased development and responsibilities for consistent high performers to groom them for promotion to the next level. Additionally, the team-based format of instruction will allow for mentoring within departmental and education plan teams to bring new hires up to speed. As discussed in previous sections of this charter application, GEI takes proactive steps to develop new leaders within The Excel Center network which develops leaders for school expansion as well as for vacant positions.

School leadership members utilize evaluation data to determine the professional development needs of individual instructors, as well as areas of growth for their 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 teams and The Excel Center network.

*Compensation System*
Employees of The Excel Center will be employed by GEI. They will be at-will employees and will not use contracts. Average salaries for The Excel Center positions are provided in The Excel Center's budget (**Attachment 18**). The salaries for staff at each Excel Center will be on par and competitive with the salaries of the local school corporations where each Excel Center is located.

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

- Comprehensive Health Plan
- Employee Life Insurance
- Comprehensive Dental/Vision Plan
- Section 125 Plan
    - Pre-tax Health & Dental/Vision Plan premiums are automatic when you enroll
- Retirement:
    - 403(b) Retirement Savings Plan
    - FICA
- Employee Assistance Program
- Tuition Reimbursement

- Personal Time Off/Vacation Days

Professional Development

In the months prior to the school start date, school leadership will be offered professional development opportunities in what has been identified by GEI as the most vital aspects of successful school start up. Areas of focus include but are not limited to the following:

- Enrollment Processes and Procedures for GEI provided by network Registrar
- State Reporting Training and Timelines provided by GEI manager of Reporting and Records
- Development of recruitment strategies and best practices by GEI Leadership & GCSI Marketing team
- Review of GEI-developed Standard Operating Procedures for all staff positions
- Curriculum, assessment, and data analysis training provided by GEI experts
- Best practices for lesson planning and delivering instruction to special student populations
- Best practices to implement The Excel Center life coaching model.

The Excel Center will incorporate job-embedded and student-focused professional growth opportunities into all components of professional development to attain continuous instructional improvement focused on student achievement. For example, during year one of school operation, internal professional development focuses on implementation of the core instructional strategies essential for meeting the needs of adult high school students. In subsequent years, teacher evaluation results combined with student achievement data will drive the professional development scope and sequence, leading to a professional development plan that includes opportunities for school-wide and individualized professional learning.

*Support for School Leaders*

School leaders will be provided with monthly opportunities for growth and collaboration with already established School Directors and other key members of the GEI team. New School Directors are also paired with a mentor School Director to provide mentoring and guidance in dealing with day-to-day school issues that may arise. All School Directors also report directly to the Senior Director of The Excel Center Network and Operations who is committed to the professional and personal growth and develop of each staff member. Prior to the hiring of instructors, coaches, and other support personnel, new school leaders will be given multiple opportunities to shadow existing sites, to learn more of the intricacies of the model and serving adults. School leaders will also be required to attend a leadership training, provided by GEI Senior Leadership and GCSI Learning and Development that will span eight sessions. These sessions blend the study and application of best practices to build leadership capacity, as well as the technical aspects of running an effective Excel Center and the unique skill sets and procedures found most effective by GEI Senior Leadership.

*Support for the Education Program*

Meaningful professional development is a staple of The Excel Center model. Staff members receive multiple specialized trainings outlined above. All staff members also participate in monthly meetings with their positional peers and colleagues across all existing Excel Centers where they will help to creatively solve problems as well as brainstorm new techniques to continuously improve the school model.

*Professional Development Schedule*

The Excel Center model is innovative in that it holds classes on Monday – Thursday and reserves Fridays for opportunities for staff to engage in professional development opportunities, driven by key data measures that are most critical to ensuring student success. All Excel Center staff will look at attendance trends, mastery, and achievement data based on unit assessments, proactively identify barriers that are unique to each community The Excel Centers serve, and enrollment trends.

No fewer than six additional professional development days are built into the typical academic calendar. There is also time dedicated each year on The Excel Center calendar for an all employee conference, where designees from all schools within The Excel Center network share information regarding topics, practices, and techniques in which they are considered to be exemplars.

*Evaluating Professional Development Effectiveness*

The professional development program will be evaluated based on school-wide and classroom achievement measures, as well as student improvement on interim assessments. Furthermore, during multiple times throughout the school year, The Excel Centers review various outcome data which are measured and compared across The Excel Center network. Following each eight-week term, School Directors and their leadership teams participate in an end of term data review. These data reviews create a meaningful opportunity to measure the effectiveness of techniques and interventions across the network. School leadership teams will leave these data reviews with concrete action steps in regards to professional development, recommended by GEI leadership to help improve outcomes and team effectiveness.

**Start-Up and Operations**

Start-Up Plan

A detailed school start-up plan is provided as **Attachment 16**.

Transportation

The Excel Centers do not provide transportation for students, due to the extended hours of operation and schedules that vary widely student-to-student, based on their unique abilities and/or family and work obligations. The school will use several options for student transportation:

- Public Transportation. Where public transportation is available, The Excel Center will be located on or near a bus line and students will be provided a bus pass, free-of-charge.
- Private Vehicles. As 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 also lends 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. School staff members will connect any student with resources needed to maintain school enrollment, including housing assistance and bus passes. All public transportation services utilized by current and proposed GEI schools run ADA-compliant Paratransit

services, which meet IDEA requirements. The special education coordinator will ensure transportation is adequate and note any needed supports in the IEP or Section 504 plan of students with special needs.

Safety and Security

The safety and security of students, staff, the facility, and all school property is a top priority for Excel Centers, and school leadership will take every step necessary to ensure that students and staff are prepared for any foreseen or unforeseen emergency, disaster, or threat. As required by law, The Excel Center will participate in mandatory fire, tornado, and lockdown drills.

Each school will have a full-time security officer who will monitor the entrance and scan active security camera feeds located throughout the school. The Excel Center will employ both an employee- and student acceptable use policy concerning technology and internet use, which will be communicated in the staff and student handbooks. The purpose of school-provided Internet access is to facilitate communications in support of research and education, and the acceptable use of electronic resources will be monitored by staff.

Furthermore, GCSI has developed its Safety, Loss Prevention and Security department to manage security and safety in its facilities. Each location is regularly audited for compliance with applicable safety, including, inventory management, labor reporting/payroll, and back-office processing policies and procedures. The Excel Centers also have a high resolution digital security camera system in operation in many locations. Each Excel Center will install a camera system as a tool to deter theft, misappropriation, and misbehavior. GCSI and GEI staff work actively with the insurance agents and carriers for risk assessments, audits, training, policy reviews, additions and deletions to listed coverage, and for business development practices.

Insurance Coverage

Proof of Insurance Coverage is provided as **Attachment 17**.

**Facility Plan**

GEI has not yet identified facilities for The Excel Center. Nevertheless, GEI, with the support of GCSI is capable at identifying facilities that are appropriate for an Excel Center location and has done so successfully with each of the eleven schools in GEI's The Excel Center network.

Staff first identify geographic areas of acute need. Facility options must be in areas with high concentrations of dropouts, or in locations that are centrally located for large numbers of dropouts to access the school. Next, GEI staff conducts transportation feasibility assessments of potential sites, where the team determines whether bus routes or other means of transportation will allow students with limited resources to attend school regularly. In addition, each facility must be affordable for the school, including any renovation projects that must be completed prior to opening.

In setting a facilities budget, GEI anticipates spending an average of $6 per square foot for appropriate space. Goodwill Facilities Management staff are able to ensure that the chosen facility complies with state and local health and safety requirements, in addition to any other requirements determined by the State Fire Marshall and local agencies. Goodwill has managed renovations at each of The Excel Center locations it has opened. Additionally, Goodwill's facilities management team is able manage local laws, regulations, and other ordinances at each of the locations in which it has a staff presence. Currently, Goodwill manages over 70 locations in Central and Southern Indiana.

GEI will invest considerable time and effort in the process of identifying school facilities in each of its target communities. A team of GEI and GCSI have been meeting and have assumed the responsibility of locating potential facilities. In selecting a facility, multiple resources across all of GEI and GCSI will be utilized to determine any renovations that may need to take place.

GCSI currently manages over 70 locations in central and southern Indiana, including all of the existing GEI-operated Excel Centers. GCSI, on behalf of GEI, will entered into lease negotiations to lease The Excel Center's selected school facility as it has done at each of The Excel Center locations GEI has opened.

GEI commits that all facilities will be ADA compliant and will meet the needs of students who are physically challenged.

**Budget and Finance**

GEI follows Generally Accepted Accounting Principles (GAAP) and State Board of Account requirements in all accounting practices for its schools. Day-to-day financial management is provided by GEI's Director of Financial Operations, who also acts as the assistant treasurer for GEI's Board of Directors. The Director of Financial Operations will be assisted and supported by the Chief Financial Officer of GCSI, who is also the Board treasurer of GEI. Payroll is managed by GEI staff for all of its employees. Excel Centers, LLC and Indianapolis Metropolitan High School, LLC are audited on an annual basis, and consolidated GEI financial operations are included with GCSI's annual audit process. GEI contracts with Greenwalt CPAs as its independent auditor to conduct the annual audits of all of its schools.

Budget development is an iterative process that will incorporate input from key stakeholders. The annual budget will be developed each year by GEI's Director of Financial Operations and the School Director with assistance from the Senior Director of The Excel Center and Operations, the Vice President of Mission and Education Initiatives, and GCSI's Chief Financial Officer. The budget will be presented to the GEI Board for review, modified as it deems necessary, and adopted. In addition, the Goodwill Foundation may solicit other private grants and donations to support the operation and development of the school. All of GEI's schools are in a strong financial position and are in good fiscal health.

GEI 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 (GEI maintains bank accounts in federally insured, non-speculative, commercial bank or credit union accounts).

A detailed 5-year Pro-Forma Budget is provided as **Attachment 18**.

A detailed budget narrative is provided as **Attachment 19**.

The last three years of GEI's audited financial statements and management letters and its most recent internal financial statements including balance sheets and income statements are included as **Attachment 20**.

## Section IV: Portfolio Review and Performance Record

Please see **Attachment 21** for a school information and performance summary of every school operated by GEI.

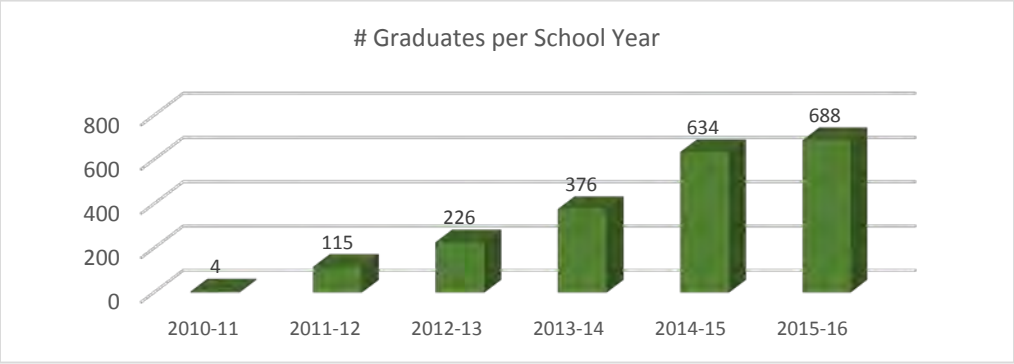
Network-Level Performance

The Excel Center model is a first-of-its-kind adult high school which creates an opportunity for those who previously dropped out of high school to reengage in their education and earn a full, state-recognized high school diploma. The Excel Center was the first adult high school in Indiana and there are no other similar school options for adults in any of the proposed locations for The Excel Center and, as such, evidence regarding The Excel Center network as a whole is provided below.

Across The Excel Center network, students enroll with a unique set of challenges and barriers to overcome:

- 80% of students receive at least one form of Public Assistance
- Only 11% of students are employed full-time
- and, 45% of students have at least one child under the age of 18

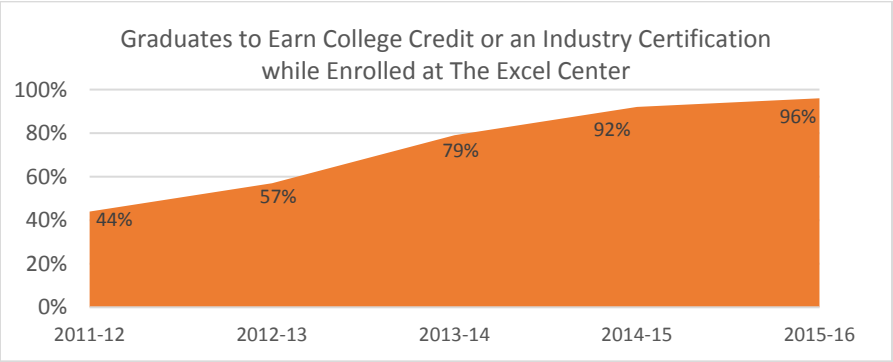
Despite these challenges, The Excel Center has experienced continue and increasing success. Over the past six years The Excel Center has seen a steady increase in the number of quality graduates and post-graduate success each year. As of January 2017, The Excel Centers operated by GEI have produced 2,385 graduates.




The Excel Center has not only increased its number of graduates each year, it has done so without reducing the quality of graduates. In fact, The Excel Center out-paces the State Average:

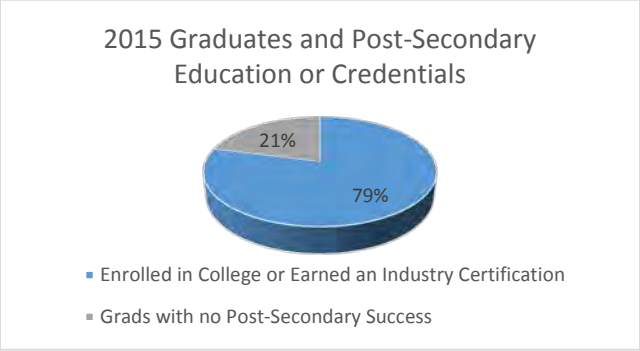
- Waiver Diplomas: Excel Center = 6%, State Average = 7%
- General Diplomas: Excel Center = 6%, State Average = 15%

The Excel Center has also focused on College & Career Readiness:

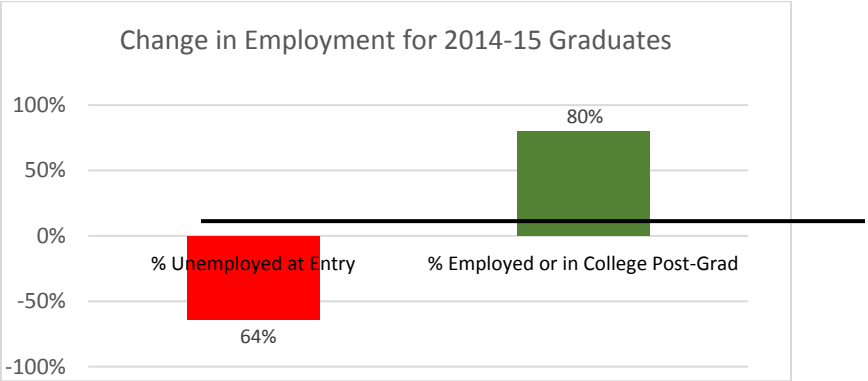



Overall, the number of industry certifications awarded to Excel Center students has increased from 74 in 2011-12 to 1,182 last school year (2015-16).

The Excel Center places additional focus on what happens to a student after he or she graduates and this is reflective in the data.




As a result of the focus on post-graduation and placing students on a career or college track, Excel Center graduates have seen a large increase in employment status at the schools that have been tracked.




The Excel Center has successfully combined a focus on producing quality graduates with a focus on preparing students for life beyond school. This has ultimately resulted in The Excel Centers having a

substantial impact in the lives of its graduates while continuing to meet, and often exceed, any applicable state metrics.

Finally, an independent research study conducted in Indiana looked at state-level wage data and determined that there are significant benefits to employment levels and to earnings of Excel Center students. Graduating from The Excel Center improved an individual's likelihood to be employed and earn higher wages than high school dropouts. Graduates created a total benefit of $9,330 per student, and students who attended but did not graduate had a benefit of $835 per student.[24]

Terminated Contracts

No contracts with charter schools have been terminated by either GEI or The Excel Center.

Charter Revocations, Non-Renewals, Shortened or Conditional Renewals, Withdrawals/Non-Openings

The Excel Centers have not experienced any charter revocations, non-renewals, shortened or conditional renewals. One Excel Center (The Excel Center – Decatur) located in Indianapolis, was closed by GEI at the end of the 2015-2016 school year. The school was located in an industrial area of Indianapolis and operated at a significantly smaller scale than other Excel Centers. As The Excel Center – Decatur continued to meet the need for a high school option for adults, the school began seeing a decline in enrollment due to fewer community members needing to take advantage of its services. After discussion with community stakeholders and careful consideration, GEI determined that closing the school and reallocating its resources to other higher need areas of Indianapolis was in the best interest of the community at large. All students enrolled at the school at the end of the 2015-2016 school year were provided an opportunity to attend other nearby Excel Centers to ensure they have every opportunity to meet the educational goals they set for themselves.

Performance Deficiencies

The Excel Centers have not experienced any deficiencies or compliance violations that have led to formal authorizer intervention in their history.

Litigation and Arbitration Proceedings

There is no current or past litigation, including arbitration proceedings, that has involved GEI or The Excel Centers.

[24] Hicks, Michael J. (2014). "Preliminary Fiscal and Earnings Assessment of the Excel Charter Academy". Center for Business and Economic Research, Ball State University.

**Attachment 1 – Applicant Group Resumes**

This attachment contains resumes from the following individuals:

GEI Staff:

- Jeffery Hoover
- Anne Davis
- Shelley Ashley
- Nioka Clark
- Jeff Curiel
- Eliese Davis
- Markous Jewett
- Kim Reier
- Jennifer Rendant
- Dan Scott
- Tonya Taylor

GEI Board Members:

- Claudia Cummings
- C. Perry Griffith, Jr.
- Betsy Delgado
- Marianne Glick
- Richard Horn
- Jill Kramer
- Kent Kramer
- Rose Mays
- Jay Oliver
- Don Palmer
- Doris Pryor

# Jeffery W. Hoover

**Improving Performance • Enhancing Programs • Inspiring Systemic Change**

## EXPERIENCED ADMINISTRATOR

*"The secret in education lies in respecting the student." -- Ralph Waldo Emerson*

Student-Centered Leader, Lifelong learner and Licensed Administrator with a Master's Degree coupled with 25 years' experience instructing and leading in secondary education, securing resources, and implementing effective programs.

SUMMARY OF QUALIFICATIONS

- An **enthusiastic, creative, and passionate educator**, who believes that all students can learn and thrive in a learning environment that is consistent, challenging, and safe.
- **Specializations include** - School Safety Specialist
- **Instructional Leadership** – Student centered, teacher driven, and high expectations
- **Leverage Resources/Strategic Collaborations** – Work collaboratively with community partners to develop strong community alliances.
- Utilize a **visionary approach** that looks into the future and sees the organization not as it is…but as it can become.

## HIGHLIGHTED PROFESSIONAL EXPERIENCES

**GOODWILL EDUCATION INITIATIVE. Indianapolis, IN** **July 2016 – Present**
**Senior Director, Excel Center Network and Operations Goodwill Central and Southern Indiana**
Overall responsibility for providing and implementing The Excel Center model to internal and external network schools. This position leads the development of service delivery standards and procedures for educational strategies for Excel Center Schools across Central Indiana and the nation. Analyzes and predicts trends of the local market and develops long-range plans designed to increase graduation rates, certifications completed, and career readiness of the participant population. Proactively researches and recommends courses of action to prevent problems and to maintain high performance levels for the Goodwill internal and external network schools. Position will be strongly centered around training and development of staff to ensure all clients and students receive appropriate referral sources, career pathways, and college transition options.

**GOODWILL EDUCATION INITIATIVE. Indianapolis, IN** **February – July 2016**
**Director, National Office of the Excel Center**
The Director of the National Office will be responsible for the academic oversight, performance, license compliance of 3-5 schools within The Excel Center external network. Reporting to the Sr. Director, INIS, The National Director and will consult with School Directors regularly regarding operational, curricular, and/or personnel inquiries. A hands-on support and mentoring process will be developed to support each school in achieving goals and outcomes.

**GOODWILL EDUCATION INITIATIVE, Lafayette, IN** **August 2014 - 2016**
**Director, Excel Center – Lafayette**
The Director will be the chief academic officer for the Excel Center. Provide hands on approach to leadership in the directing, planning, managing, and coordinating the educational goals and vision of the school. Ensures that instructors and school curriculum are applied according to the principles of the Excel Center and that school is meeting the desired outcomes. Provides support and leadership to staff of 20- 25. Essential functions include: supervision and management of faculty and staff, creating and maintaining a safe and secure educational environment for 200-500 students and managing the fiscal activities of the school.

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**ROSSVILLE HIGH SCHOOL, Rossville, IN** **2009 – 2014**
**High School Principal**

- Guided a building consisting of 285 students and 30 staff for grades 9-12
- Monitored the development and implementation of curriculum aligned to state standards.
- Provided professional development that supports the continued growth of staff and improvement of student achievement.
- Conducted staff evaluations to improve classroom instruction.
- Guided the analysis of student data in order to assist staff in making instructional decisions.
- Allocated financial resources in a fiscally responsible manner.
- Ensured the safety of all student and staff by promoting and maintaining student discipline.

**NORTHWESTERN HIGH SCHOOL, Kokomo, IN** **2006 – 2009**
**Assistant High School Principal**

- Received the National Blue Ribbon from the USDOE (2006)
- Maintained student discipline through firm, fair, and consistent policies.
- Monitored student attendance and chaired an effective attendance review committee.
- Supervised student activities on a weekly basis, including athletic and extra-curricular activities.
- Assisted in the organization of staff development activities
- Conducted staff evaluations to improve classroom instruction.

**NORTHWESTERN MIDDLE SCHOOL, Kokomo, IN** **1988 –2006**
**Seventh Grade Science Teacher**

- Seventh Grade Team Leader, Parent Liaison, and Activities Director
- Developed and implemented intervention program for at-risks students
- Led Honors Science Program for 7th grade students

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## COMMUNITY SERVICE

Board of Directors - Clinton County United Way
Executive Board - SHOCAP of Howard County
Clinton County School Safety Commission

## EDUCATION

**M.Ed., Educational Leadership & Supervision**, Ball State University, Muncie, IN - 2006
**B.S., Education**, Central Michigan University, Mt. Pleasant, MI – 1987

## ASSOCIATIONS & CERTIFICATIONS

National Association of Secondary School Principals
Indiana Association of School Principals
RTI Action Network
Association for Supervision and Curriculum Development
Indiana Department of Education AP Advisory Council

# Anne Davis

## Qualifications Summary

Extensive educational leadership experience at the state and district level in the areas of innovative systems change; curriculum, instruction, and assessment; and maximizing opportunities for underserved populations of learners. Focus on data-based decision making in order to significantly improve outcomes. In-depth experience in oversight and effective implementation of federal entitlement programs at the state level, including: Special Education, Title I, Title II, English Learners, and Migrant Education. Facilitated the authorization and assessment of charter schools. Additional experience with Vocational Rehabilitation and Indiana's Medicaid Waivers for Individuals with Developmental Disabilities. Collaborative leadership of large-scale projects, including re-engineering of quality assurance programs and the development of quality improvement initiatives at the state level. Strengths include systems design, program implementation and evaluation, culture change, and the ability to effectively manage multiple large-scale projects simultaneously while maintaining overall quality.

**Education and Certification**

**Degrees**

- **Master of Science, Education,** Indiana University
- **Bachelor of Science , Elementary Education,** Valparaiso University

**Certifications**

- **Director of Exceptional Learners,** Purdue University
- **Administrative Certificate,** Indiana University

## Key Knowledge Areas

| | | |
|---|---|---|
| • Project Management | • Special Education | • Culture Shift |
| • Curriculum and Instruction | • Systems Change | • Federal Entitlement Programs |
| • Innovation | • Data-based Decision Making | • K-12 Education |
| • Charter Schools | • Vocational Rehabilitation | • Collaborative Leadership |

## Relevant Experience

- Designed IDOE's consolidated grants monitoring system to maximize state resources while providing effective program area and fiscal oversight of Title I, English Learners, and Migrant Education and the $280 million annually generated by those grants.
- Worked collaboratively with the directors of Indiana's technical assistance resource centers to develop an innovative risk-based trigger for providing supports to school districts that would improve educational outcomes.
- Used data to support the compliance of Indiana's 370+ Local Educational Agencies (LEAs) with federal rules and regulations outlined in IDEA. Provided accountability by assigning technical assistance, professional supports, and when necessary, corrective action to ensure appropriate services for students with disabilities.
- Maintained ongoing collaboration with various IDOE program areas, including the offices of Assessment, School Accountability, School Turnaround, and Educator Effectiveness to ensure seamless support of IDOE initiatives.
- Responsible for the supervision and effective management of multiple federal program areas, including: Special Education, Title I, Title II (Teacher Effectiveness), Title III (English Learners), and Title I Part C (The Education of Migrant Children).
- Facilitated the authorization, development, and assessment of charter schools through the processes established within the Indiana Charter School Board. Supported schools in identifying areas of need and engaged in ongoing discussions about effective school development and innovative practices to meet students' needs.

**Employment History**

**State of Indiana, 6 years**

- **Director,** Bureau of Quality Improvement Services, Division of Disability and Rehabilitative Services (Indiana Family and Social Services Administration)
- **Director,** Indiana State Board of Education
- **Director of Accountability,** Indiana Charter School Board
- **Director of Individualized Learning,** Indiana Department of Education
- **Director of Special Education,** Indiana Department of Education

**School City of Hammond, 19 years**

- Administrator for Special Education
- Curriculum Coordinator
- Principal

- Partnered with the Bureau of Rehabilitative Services (BRS) and Vocational Rehabilitation (VR) in the development of a provider application process as VR transitioned to new service definitions and requirements.
- Facilitated a culture shift between the Bureau of Quality Improvement Services and the Home and Community Based Services (HCBS) Medicaid waiver providers. Moved the long-standing adversarial relationship to one of trust, collaboration, and open dialog.
- Developed a "Data Driven Review" quality improvement process to address a system-wide deficiency while at the same time strengthening Indiana's Medicaid waiver providers and supporting the health, safety and welfare of the individuals served by the program.
- Maintain engagement with a variety of stakeholder groups, including internal, governing boards, professional organizations, and governmental agencies in order to ensure shared understanding and seamless implementation of statewide initiatives.

## Professional Presentations

- **Indiana Association of Rehabilitation Facilities:** *Data Trends, Quality Assurance, Quality Improvement*
- **Indiana Association of Behavior Consultants:** *Using data to improve outcomes*
- **Indiana Public Charter School Association**: *Accessing Federal Programs*
- **Indiana Nonpublic Schools Annual Conference**: *Equitable Services for Nonpublic School Students*
- **Indiana Association of School Psychologists Annual Conference**: *Major Initiatives from the Office of Special Education*
- **Office of Special Education Programs (OSEP) Conference**: *Federal Indicator 8 and Indiana's Successful Collaboration with Advocacy Groups*

# Michelle (Shelley) Ashley

**2105 W CR 50 South • Danville, IN 46122**
**317.800.8866 • ddaska@sbcglobal.net**

## *Work Experience*

***Senior Director of Mission Advancement*** — ***Goodwill Industries of Central Indiana, Inc.***
Indianapolis, Indiana — July 2015 - Present
Provides the strategic direction for Goodwill Guides, TalentSource, SCSEP, College & Career Readiness Specialists and Lead Coaches. Leads the development of service delivery standards and procedures for placement strategy. Analyzes and predicts trends of the local employment market and develops long-range plans designed to increase career readiness of the participant population. Proactively researches and recommends courses of action to prevent problems and to maintain high career placement levels for the Goodwill client community. Coordinates training and development of staff to ensure all clients and students receive internal and external referral sources, career pathways, and college transition options. Supports the VP of Mission and Education Initiatives in creating quality training, processes and outcomes for Goodwill clients and work on aligning services to promote collaboration and cooperation across internal and external mission initiatives, partnerships and education services.

***School Director*** — ***Goodwill Education Initiatives***
The Excel Center - Decatur — January 2015 – June 2015
Lead, manage and evaluate staff in all aspects of academic advising, barrier removal, academic instruction, expectations and discipline. Provide ongoing training and professional development for staff. Hold staff and students accountable to The Excel Center expectations. Work with Goodwill Education Initiatives leadership to manage building level budget. Build relationships to develop broader awareness and understanding of The Excel Center mission within the community. Lead staff in marketing and outreach endeavors to insure enrollment targets are maintained. Insure safety and security of all staff and students by using best practices for compliance and related data tracking.

***Quality Control Lead*** — ***Goodwill Education Initiatives***
All Excel Centers — April 2013 – January 2015
Provide support and leadership across all Excel Centers in the implementation of various systems and best practices. Provide Crisis Prevention Training to all staff across all buildings. Assist in marketing and outreach for launching multiple Excel Centers. Record academic credits for students across all Excel Centers. Complete academic audits to confirm graduation status of graduates across nine Excel Centers. Serve as primary graduation ceremony coordinator for all Excel Center graduations. Provide on demand various statistics and data relevant to Excel Center students and graduates. Coordinate and lead College and Career Readiness staff meetings for Excel Center network. Assist new Excel Centers with developing relationships with Ivy Tech Community College and Work One to increase opportunities for dual credit and certifications. Assist and support Excel Center Directors, Regional Directors and Executive Director on a wide variety of special projects. Assist in planning and coordination of Excel Center Conference. Assist in planning and coordination of new staff onboarding.

***College Transition Counselor*** — ***Goodwill Education Initiatives***
The Excel Center – Michigan Street — July 2010 – April 2013
Serve as academic advisor and assist students in course scheduling, academic planning and post-secondary planning. Provide students with opportunities for exposure to post-secondary options through college visits and a wide variety of career exposure. Design, coordinate and implement new student orientation (iExcel) across all Excel Centers. Complete academic audits to confirm graduation status of all graduates. Responsible for all aspects of graduation practice and ceremony. Work with small group to design and implement Senior Seminar and Graduate Portfolios.

***Academic Advisor*** ***Marian's Adult Programs, Marian University***
Indianapolis, Indiana August 2008 - July 2010
Advise students regarding course selection, registration, degree planning and all matters pertinent to pursuing undergraduate degrees. Maintain regular contact with and develop positive relationships with advisee pool of over 200 students. Serve as advocate and liaison for advisees as needed.

***Enrollment Advisor*** ***Marian University***
Indianapolis, Indiana April 2007 – August 2008
Advise prospective and current students regarding all aspects of the enrollment and academic processes including: transcript evaluation, degree planning, course scheduling and various academic issues. Represent Marian's Adult Programs to prospective students in individual appointments and larger group settings.

***Training & Development Assistant*** ***Free Methodist World Missions***
Indianapolis, Indiana November 2004 – March 2007
Coordinate schedules for missionary debriefings. Assist Training & Development Coordinator with organizing, planning and implementing training programs for new missionaries. Develop presentations relevant to training and human resources issues.

***Open Source Analyst*** ***Science Applications International Corporation (SAIC)***
Danville, Indiana (long term assignment through Innovative Employee Solutions)
June 2000 – February 2001 and June 2001 – September 2004
Analyzed information posted to various Internet sources. Prepared confidential reports for submission to clients. Prepared Alerts/Flashes daily as warranted for submission to clients. Proofread and edited weekly and monthly reports from other analysts.

***Assistant Director of Admissions*** ***Spring Arbor University***
Spring Arbor, Michigan July 1994 - October 1999
Responsibilities included: coordinating individual and group campus visits; planning and organizing various special events; recruiting and advising transfer and non-traditional students in educational and vocational opportunities; initiating and maintaining correspondence with prospective students; working with students to develop academic plans and schedules; interviewing, hiring and supervising professional admissions staff and student workers; compiling various enrollment and budget reports on a regular basis; organizing and implementing telemarketing and direct mail strategies; designing, proofreading and editing brochures, advertisements and direct mail pieces.

***Conversational English Teacher*** ***Vécsey Károly Primary School***
Nyíregyháza, Hungary September 1993 - June 1994
Taught conversational English to elementary and adult students.

***Admissions Representative*** ***Spring Arbor University***
Spring Arbor, Michigan August 1990 - August 1993
Represented SAU to prospective students at high schools, college nights, job fairs and churches.
Responsibilities also included: Coordinating campus visit days; telemarketing; group presentations; and campus tours.

## *Education*

***Bachelor of Arts – Communication*** **Cum Laude, May 1989**
Spring Arbor University Spring Arbor, Michigan

# Nioka M. Clark

## EDUCATION

**Indiana University**; *Indianapolis, IN* December 2012
Masters of Science in Education Technology and Curriculum Design
GPA 3.7/4.0

**Saint Joseph's College**; *Rensselaer, IN* (NCATE Accredited) May 2006
Bachelor of Arts in English Literature, Magna cum Laude
Minor in Secondary Education
GPA 3.8/4.0

## LICENSE

**Professional Educator's License;** *State of Indiana* Expires May 2023
Language Arts Middle School/Junior High
Language Arts High School

## ADMINSTRATIVE EXPERIENCE

**The Excel Center;** *Indianapolis, IN* March 2017 – Present
Curriculum Services Director

- Collaborates with leadership from Goodwill Education Initiatives and individual buildings to develop a curricular vision for all schools.
- Directs the planning, delivery, assessment, and ongoing improvement of curriculum, instruction, and assessment.
- Facilitates staff development programs in the areas of curriculum, instruction, and assessment.
- Develops and implements process for curriculum, instruction, and assessment audits and creates recommended action plans based on results. Works with school leadership teams to ensure fidelity to curriculum models and serves as a resource/expert in curriculum planning and delivery.
- Reviews course and content data, makes recommendations regarding revisions as necessary. Researches new and innovative curricular practices to incorporate into new and revised courses.
- Reviews externally and internally produced content and resources to ensure alignment to standards-based curricula. Assists in the curation of instructional materials.
- Leads process for the evaluation and selection of instructional resources.
- Facilitates development of data analysis process surrounding standards-based common assessments.
- Conducts data analysis of formative and summative assessments in order to evaluate and recommend adaptations or additions to existing curricula in order to improve students' educational program and outcomes.
- Researches, recommends, and monitors efficacy of instructional interventions.

**The Excel Center;** *Indianapolis, IN* Sept 2011 – June 2017
Lead Teacher

- Developed, coordinated and implemented the English/Language Arts curriculum throughout all 11 Excel Center locations
- Developed and implemented various online credit recovery courses for students throughout the network
- Coordinated all End-of-Course Assessment (ECA) testing for the Excel Center – Michigan Street location, including the training of 200 employees on testing practices and procedures
- Participated in an English 10 ECA review session administered by Questar and the Indiana Department of Education
- Analyzed all ECA data in order to identify patterns and areas of weakness and used that information to help instructors adapt their curricula
- Evaluated and coached instructors of various disciplines using the RISE rubric
- Implemented and maintained a work-experience portfolio program that allowed students to earn high school credit based on work experience

**The Excel Center;** *Lafayette, IN* March 2013 – April 2014
Director

- Organized over 20 student enrollment events throughout the Lafayette area
- Networked with over 80 various community partners
- Responsible for interviewing and hiring all staff members
- Coordinated and implemented professional development activities for staff
- Analyzed student data weekly for various accountability models
- Evaluated the leadership team, all teachers and coaches
- Communicated with building owners and various vendors
- Oversaw all day-to-day activities throughout the school year
- Taught one period of English 111

## TEACHING EXPERIENCE

**The Excel Center**; *Indianapolis, IN* June 2010 – June 2017
English Teacher; English 9, 10, 11, 12 and American Studies

- Created a benchmark assessment system that could predict a student's success on the English 10 ECA
- Developed the English curriculum for grades 9-12 based on the Indiana Academic Standards
- Created and taught a progressive American Studies class where students earned 10 credits in 16 weeks
- Utilized a Learning Management System (LMS) to develop a "blended" American Studies course

**North Miami Middle/High School;** *Denver, IN* Aug. 2009 – Aug. 2010
English Teacher; English 9, Sports Literature and Language Lab

- Instructed freshmen, juniors and seniors in college prep, remediation and elective courses
- Developed and implemented the curriculum for both the English 9 and Sports Literature courses
- Remediated six juniors in order to help them succeed in their current English classes as well as pass the GQE
- Active member of both North Miami's NCA Accreditation team and the RtI Team

**Homestead High School;** *Fort Wayne, IN* Aug. 2007 – Aug. 2009
English Teacher; Senior World Literature, Junior American Literature, English 10A/B, and English 12B

- Instructed sophomores, juniors and seniors in both college prep and remediation courses
- Developed and implemented the curriculum for a brand new English 12B course
- Taught a course (English 12B) which prepared seniors (who were generally not going to college) for the "real world" by incorporating current, relevant novels and presentations
- Created and maintained close, professional relationships with coworkers and administrators

**Crown Point High School;** *Crown Point, IN* Aug. 2006 – Aug. 2007
English Teacher; Freshmen Honors English and Junior American Literature and Composition

- Instructed 65 freshmen and 90 juniors
- Developed and followed a curriculum map for both courses that adhered to the Indiana Academic Standards
- Administered Six Week Assessments for every course based on the Understanding by Design model

## AWARDS

- Goodwill Education Mission 2016 Outstanding Teacher
- IACTE Outstanding Future Educator Award
- Saint Joseph's College Student Teacher Excellence Award
- ETS Recognition of Excellence Award for Outstanding Praxis II Scores in English Language, Literature and Composition: Content Knowledge

# Jeff Curiel, CPA

**PROFESSIONAL EXPERIENCE:**

GOODWILL EDUCATION INITIATIVES, INC., INDIANAPOLIS, IN

Director of Financial Operations — April 2015 – Present

- Collaborate with the Mission Advancement VP and education leaders to scale national expansion efforts
- Attend bi-monthly BOD meetings to provide commentary on financial statements and projected results
- Conduct meetings with senior management and site Directors to analyze financial results and operations
- Assist the HR team with the analysis and implementation of policy amendments (FLSA and PTO)
- Maintain relationships and conduct quarterly meetings with State charter authorizers
- Assist in the development and implementation of the strategic plan
- Oversee the financial close process and preparation of the monthly financial statements and BOD reports
- Review, analyze, and provide insight on all financial reports
- Prepare the annual operating budgets and financial projections for all business units
- Focused on leveraging financial resources to improve operations and financial sustainability
- Report and consolidate 15 business units, supervising all accounting and payroll personnel
- Increased operating cash reserves by 40% to generate additional income through investments
- Review and approve all corporate expenditures

GREENWALT CPAS, INC., INDIANAPOLIS, IN

Manager, Audit & Other Assurance Services — December 2011 – April 2015
Senior Staff, Audit & Other Assurance Services — October 2009 – December 2011

- Served as the main contact for 15 clients, working alongside CEOs and CFOs
- Provided Controller services to a client, assisting with accounting activities, selection of a new accounting system, system implementation and coordination of their external audit
- Prepared and presented financial statements to BODs and fiscal committees, meeting strict deadlines
- Applied historical and analytical analysis to modify internal processes and improve efficiency
- Managed simultaneous projects staffed with teams of up to five professionals

CROWE HORWATH LLP, INDIANAPOLIS, IN

Audit Senior Staff — June 2008 – October 2009
Audit Staff — September 2006 – June 2008

- Supervised the audits of manufacturing companies with revenues in excess of $300 million
- Increased the realization on two engagements by analyzing the budgets and prior year workpapers to implement efficiencies
- Satisfied client needs by completing an initial year audit of a royalty liability to fulfill a legal covenant, salvaging a portion of their operations

**EDUCATION:**

Purdue University, West Lafayette, IN — May 2006
Bachelor of Science in Accounting, Minor in Finance

**COMPUTER SKILLS:**

Microsoft Excel, Word, and PowerPoint · Blackbaud Financial Edge · QuickBooks · Google Drive

**PROFESSIONAL ASSOCIATIONS:**

Board of Directors - AYS, Inc. — March 2016 - Present
Audit Committee, National MS Society - Indiana State Chapter — August 2014 – Present
Finance Committee, National MS Society - Indiana State Chapter — December 2009 – August 2014
Indiana CPA Society, Integrated Reporting Committee — August 2013 – December 2013
United Way of Boone County Leadership Program — September 2012 – May 2013

# Eliese Davis

## Professional Summary

Accomplished talent acquisition leader with keen eye for identifying and attracting top talent to progressive organizations. Consistently demonstrates optimistic approach and fun sense of humor. Serves as strategic advisor to hiring managers to ensure best practices while creating a competitive edge in talent market. Known for exhibiting core values of honesty and integrity while creating long term business relationships. Excels at working within market challenges to uncover exceptional talent. In-depth experience across numerous industries to include education, social services, manufacturing, healthcare, service, technology and financial services.

| | | |
|---|---|---|
| **Project Leadership** | **Business Development** | **Employee Retention** |
| **Account Management** | **Behavioral Interviewing** | **On boarding** |
| **Needs Assessment** | **Candidate Sourcing** | **Bilingual – Spanish** |
| **Talent Acquisition** | **Applicant Tracking Systems** | **Team Leadership** |
| **Recruiting Process Development** | **Cultural Integration** | **Strategic Results** |

## Professional Experience

**SR. MANAGER, TALENT ACQUISITION** January 2013-Present
**TALENT ACQUISITION MANAGER** June 2011-January 2013
**Goodwill Industries of Central and Southern Indiana** Indianapolis, IN
Lead talent acquisition efforts of all non-retail employees for nationally top-ranked Goodwill. Includes workforce planning, assessing and making recommendations for strategic talent needs and potential challenges. Navigate a changing talent market in a high-change, fast-paced organization.

- Spearheaded strategic recruiting process development and implementation across two newly formed, high growth divisions - Goodwill Education Initiatives and Nurse Family Partnership.
- Developed and delivered training for new hiring managers on recruiting and interview best practices to create well prepared, confident employers while decreasing liability to organization.
- Built, developed and managed strategic working relationships with all hiring-managers through direct interaction to understand the position's strategic business objectives and cultural fit to develop high impact recruitment strategies to meet current and future hiring needs.
- Key Strategic team member which evaluated and implemented applicant tracking and HRIS systems (Jobvite, iCims and Workday) Result: targeting of most qualified candidates and reduced man hours, time and cost to fill.
- Provided support, resources, training and leadership to a team of recruiters who individually fill over 100 professional level positions annually.
- Created, strengthened and maintained a robust applicant pool of high quality candidates by utilizing all available tools and venues (Internet, social media, advertising, job fairs, open houses, cold-calling, and referrals) and by building, developing and managing collaborative working relationships with contacts at colleges, industry, community, and nationally based organizations.
- Restructured metric reporting process which saved over 20 man-hours monthly.
- Developed and financially evaluated cost of hire and cost of turnover metrics. By leveraging working sources and realigning organization focus on retention, sourcing spend decreased by 40%. Result: increased tenure of employees and decreased organizational human capital cost by over 1.5 million annually.
- Key partner in high growth areas - led recruitment team and charge to grow over 9 new adult high schools in 5 years and 4 nursing teams.

**DIRECTOR OF TALENT ACQUISITION** March 2010 – June 2011
**HR Dimensions / Career Partners International** Indianapolis, IN
Manage recruiting practice for leading human resource consulting firm and partner of global talent management organization. Includes developing business opportunities, assessing and making recommendations for clients' strategic talent needs and potential challenges, source, identify, interview and present candidates to hiring managers. Provide insights and objective input to hiring manager and candidates during hiring process. Supervise three part-time recruiters.

- Spearheaded recruiting project during time of rapid ramp-up for Indianapolis headquartered organization. Interfaced with multiple hiring managers to fill positions nationwide and through all business units and established trusted relationships. Filled six professional positions within first 45 days and educated organization on best hiring practices in a rapidly changing market.
- Created recruiting process and hiring practices including instruments to assess hiring manager needs, candidate qualifications and skills, interview debriefs, reference forms, offer packages.
- Researched, evaluated and implemented applicant tracking system which facilitated targeting of most qualified candidates and reduced time to fill.
- Presented as a SME to groups such as Business Professional Exchange and Work One to actively increase company's name recognition in the community, while educating professionals in transition.

**RECRUITER** **2009-2010**
**Repucare/Repustaff, Inc** Indianapolis, IN
Implemented and managed full cycle recruiting process for professional healthcare professionals to include OT's, PT's, RN's, and NP's. Focus on client relationship development and employee relations.

- Secured over 100k in new business in first six months by implementing a strategic client identification sales plan.
- Received increased responsibilities due to successful recruiting record

**EXECUTIVE RECRUITER** **2006-2009**
**KellerNiemann, Inc** Indianapolis, IN
Full cycle professional placement recruiting for accounting and finance professionals in the Midwest. Clients spanned all industries to include manufacturing, healthcare, financial services, and others.

- Full desk recruiting to include client identification and development, evaluation of hiring managers needs, candidate sourcing, screening, tracking, and offer negotiation.
- Was first recruiter in ten year KNI history to secure AGF and Whirlpool as clients – targeted accounts that resulted in over 150k in revenue.
- Consistently a top producer and award winning recruiter for sales. Awards include: Top Producer of the First Quarter 2007-2008, Recruiter of the Month October 2007, November 2008.
- Implemented positive attitude and team-winning approach into a highly competitive environment. Result: focused and committed team members worked *together* to make more placements and beat previous years individual and company sales.

**RECRUITER/SENIOR OFFICER** **2002-2006**
**Department of Justice – Federal Bureau of Prisons** Milan, MI
A government entity that ensures the safety and security of correctional institutions while promoting rehabilitative programs for offenders. Duties included full cycle recruiting across all bureau departments to include healthcare, manufacturing, IT, safety, food service, and operations.

- Overcame consistent challenges and objections of potential recruits regarding working in a volatile environment. Increased employee retention rates by over 15% in two years while diversifying employment demographics.
- Received Rookie of the Quarter Award for implementing training and leadership skills learned at the Federal Training Center in Glynco, GA.
- Received a Token Merit Award for above and beyond service in helping staff during times of institutional change to include scheduling, trainings, and institutional and individual communication between staff and inmates.

## Education and Professional Affiliations

MBA December 2013
***University of Indianapolis***
Concentration in Finance

B.S. in Criminal Justice and Psychology April 2001
***Eastern Michigan University***
Cum Laude

Organizational Established Leader Series - Crucial conversations, Speed of Trust, Oz Principal, Situational Leadership
Human Resources Professional Development Association - Member
Indianapolis Society of Human Resource Management – Membership
National Society of Human Resource Management – Member
Diversity Roundtable of Central Indiana – Member
Jonnie's Goodguys – a non-profit organization that fundraises for the National Marfan's Foundation
Habitat for Humanity Women's Build - 2014, 2015, 2016

# Markous E. Jewett

mjewett@excelcenter.org

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## EDUCATION

**Earlham College** Richmond, IN Aug 2002-May 2007

**Major:** Psychology
**Minor:** N/A
**Bachelor of Arts:** May 2007

## EXPERIENCE

**Indiana Network of Independent Schools** Indianapolis, IN May 2016-Present

*School Development Director- Excel Center National Office*

- Responsible for comprehensive development and continuous improvement of 3-5 Excel Center network schools.
- Create and deliver ongoing professional development opportunities for all Excel Center staff
- Continued monitoring and support to all TEC Network Schools, ensuring quality control, accountability, and best practices.
- Create and modify curricular and instructional materials as needed

**Goodwill Education Initiatives** Richmond, IN Feb 2015-May 2016

*Director*

- Oversee a staff of 16 employees in all day to day operations
- Develop and cultivate recruitment and retention strategies
- Track all necessary data to ensure measurable outcomes for all students & key stakeholders
- Plan & coordinate professional development opportunities for TEC-Richmond & entire Excel Center network

**Goodwill Education Initiatives** Richmond, IN Jul 2013-Feb 2015

*Lead Teacher*

- Assist Director in creation of professional development opportunities/goals
- Create data tracking systems to measure fidelity of implementation
- Assist in teacher evaluations using RISE rubric
- Instructional coaching support for teachers

**Richmond Community Schools** Richmond, IN Aug 2009-Present

*Behavior Specialist*

- Plan and develop curricula for district-wide staff development
- Create data tracking systems using PowerSchool to measure fidelity of program implementation
- Develop skill building activities to help guide struggling administrators and teachers
- Complete on-site observations to measure curricula implementation success and shortfalls

**Department of Child Services** Richmond, IN Nov 2007-Aug 2009

*Family Case Manager II*

- Investigate and assess concerns of child abuse/neglect
- Maintain continual contact with families and service providers ensuring children's safety
- Manage 20-25 assessments simultaneously
- Supervise 15-18 children and families to ensure progress in family plans

## Certifications, Trainings & Awards

**Crisis Prevention Intervention Trainer**- (June 2009 – Current)
**Fred Jones: Tools for Teaching Trainer –** (June 2010 – Current)
**Steps to Respect: Trainer –** (June 2009 – Current)
**GICI: Established Leadership Series Participant –** (2014-2015)
**GEI: Technical Leadership Series Participant –** (2015)
**Wayne County Area Chamber of Commerce: Educator of the Year (2016)**
**GEI Leadership Award (2016)**

**ACTIVITIES**

**Richmond YMCA Board of Directors:** Member since January 2013
**Complete College Wayne County Board Member: S**ince Feb 2015
**Wayne County Business Education Team Member:** Since Feb 2015
**Wayne County Literacy Coalition Board Member:** Since July 2015
**Mayor's Committee for Economic Vitality:** Since July 2015

# KIMBERLY REIER

Recognized as a trusted, results-oriented, and energetic leader with a proven track record of success. Demonstrated ability to lead by influence and develop strategic relationships in a fast-paced environment. Experience in development, teambuilding, and cross-functional project management.

## Core Qualifications & Skills

- Exceptional oral and written communication skills
- Results- and detail-oriented
- Multi-task management
- Creative problem solving
- Relationship building
- Ability to work cross-functionally
- Grant writing and development
- Quick learner

## Work Experience

GOODWILL EDUCATION INITIATIVES, INC. ● Indianapolis, IN ● March 2013 – Present

*A non-profit organization affiliated with Goodwill Industries of Central Indiana, Inc. Operating 12 schools, Goodwill Education Initiatives (GEI) is the largest charter school operator in Indiana. GEI is rapidly growing as it is nationally licensing its adult high school model (The Excel Center®) and providing back office services to client school across Indiana through GEI's business arm, INIschools.*

Director of Network Development & Advancement (June 2014 – Present)

Responsible for developing, implementing, and scaling new and existing initiatives within Goodwill Education Initiatives (GEI), including: (1) expand and grow The Excel Center national network; (2) support the delivery of services to The Excel Center network schools; (3) expand and grow the portfolio of INIschools clients; (4) plan new initiatives related to expanding and improving the reach of GEI; and (5) secure funding and resources to implement new initiatives and lower the operating costs of existing initiatives.

- Develop and grow The Excel Center national network, managing the charter approval of Excel Centers outside of Goodwill Industries of Central Indiana's territory
- Oversee and manage the charter approval and activation process of 12 schools within and outside of Indiana
- Develop and grow GEI's business arm, INIschools, resulting in more than 20 new clients
- Oversee cross-functional development efforts leading to over $3 million in grants
- Secure over $500,000 in projected revenue in the next fiscal year for client-related work, with many other revenue-generating projects in the pipeline

Lead Services Manager (September 2014 – June 2014)

- Responsible for school start-up and account management of network charter schools
- Oversaw and coordinated all aspects of services provided to clients and proactively offer ideas and insights to improve clients' issues and challenges
- Worked closely with partner schools' leadership teams and INIschools staff to develop school improvement plans, coordinate services and track implementation of plans
- Assisted in proposing and securing new partnerships
- Led communication efforts with stakeholders, including launching and managing social media efforts
- Served as a client relationship management function of INIschools
- Served as a project management function of INIschools

Transitional Lead Admissions and Outreach Coordinator (March 2013 – September 2013)

- Oversaw the successful transition system from a paper-based student enrollment system to an online-based student enrollment, affecting nearly 3,000 students across 9 school sites

INDIANAPOLIS MAYOR'S OFFICE, OFFICE OF EDUCATION INNOVATION ● Indianapolis, IN ● March 2012 – March 2013

*A nationally renowned charter school authorizer, with oversight of over 30 schools in Marion County, Indiana. The Indianapolis Mayor's Office was the first mayor in the nation with the authority to authorize charter schools.*

Academic Performance Analyst

- Responsible for creating and managing metrics related to school performance and evaluating the Mayor's portfolio of charter schools against those metrics
- Developed partnerships with community and national organizations
- Maintained communication with school leaders and school boards to conduct quarterly compliance meetings with each Mayor-sponsored charter schools
- Collected, interpreted, analyzed and maintained performance data to identify trends, strengths, and shortcomings
- Coordinated the necessary parties within the Mayor's office, Mayor-sponsored charter schools, and external parties to assess the academic needs of more than 200 schools
- Produced annual performance reports for each Mayor-sponsored charter school

- Recommended charter school applicants to the Mayor based on the evaluation of applications against pre-established criteria in areas of academic performance
- Observed all legislative issues affecting K-12 education and provide testimony on behalf of the Mayor's Office

INDIANA DEPARTMENT OF EDUCATION ● Indianapolis, IN ● February 2007 – March 2012

*An over 250-employee state agency charged with implementing state rules, laws, and policies related to K-12 education.*

Accountability and Data Specialist (May 2010 – March 2012)

- Assisted with the development of Indiana's statewide school accountability system, maintained communication and relationships with senior leadership and external stakeholders to collaboratively develop new policies and reforms
- Coordinated communication efforts with school and district administrators related to school accountability through oral and written communications, including creating and making presentations
- Analyzed and evaluated programs across the Department, identify trends and issues, and work with senior leadership and appropriate parties to improve the overall efficacy of those programs, as needed
- Made and implemented policy recommendations for improving existing state and federal school accountability systems
- Provided guidance to school and district leadership across the state regarding accountability systems and measures using various methods of communication
- Oversaw program evaluation activities and the implementation of 3 new programs related to data management and quality
- Provided assistance in managing the Department's collaborative role with the Indiana Workforce Intelligence System (IWIS)

Program Specialist (February 2007 – May 2010)

- Designed and implemented Indiana's Alternative Education accountability system
- Developed monitoring systems for 4 state and federal programs
- Conducted annual statewide evaluations for state and federal programs
- Aided in securing over $5 million in federal grant funds
- Revamped Indiana's administrative spending on IDEA, Part B through the development of statewide special education resource centers

## Education

Butler University, Indianapolis, IN, Bachelor of Arts, May 2009
Major: Political Science
Minors: Peace Studies and French

## Recognitions & Affiliations

- Elected by executive staff to participate in Goodwill's Established Leaders Series ● October, 2015
- Received Indiana Department of Education's "Best Idea Wins" Award for submitting an idea projected to save the department more than $250,000 annually Series ● October, 2015
- Indiana Network of Knowledge (INK) – formerly Indiana Workforce Intelligence System (IWIS), Advisory Board Member ● January 2012 - April 2015
- University of Phoenix College of Education, Advisory Board Member ● April 2013 – April 2014

## Presentations & Publications

(as Kimberly Clement)

- Barrett, K., Clement, K., & Gosa, K. (2011). Revising Collections to Reduce Burden & Increase Data Quality. Presented at the 2011 P-20W Best Practices Conference, Arlington, VA.
- Clement, K., Patton, M., & Roewe, B. (2010). Changing Cultures from Annual Reports to Real-Time Tools. Presented at the 2010 SLDS P-20 Best Practices Conference, Washington, DC.
- Bickell, M., Clement, K., Houde, D., & Howard, L. (2010). Leading Your Statewide Longitudinal Grant through Political Transitions. Presented at the 2010 SLDS P-20 Best Practices Conference, Washington, DC.
- Clement, K., Chamberlin, M., & Foxx, S. (2009) 2007-2008 survey of students in alternative education programs. Analysis conducted for the Indiana Department of Education (*publication no longer available online*)
- Chamberlin, M. & Clement, K. (2008). Accountability for confirming success: Indiana's profile project. Presented at the 2008 Superintendent's Summer Institute, Portland, OR.
- Chamberlin, M. & Clement, K. (2007). 2005-2006 statewide evaluation of supplemental educational services in Indiana. Evaluation conducted for the Indiana Department of Education (*publication no longer available online*)

# Jennifer C. Rendant

## About

Enthusiastic communications specialist with both supervisory and administrative experience. Possess commitment to non-profit missions, strategic planning, audience-centric approaches, and brand architechture. Expertise includes, but is not limited to, school expansion and student recruitment, website design, content development, proofreading and editing media content, developing long-term and short-term communications plans, and detail-oriented projects, including events or tasks.

## Skills

Strategic Communications

Online databases & research

Social media marketing

## Areas of Expertise

-Strategic communications and marketing
-Leading and collaborating with both large and small teams
-Managing and training various staffs and audiences
-Multi-tasking numerous large scale projects
-Collecting, analyzing, and tracking data

## Education

**2005- 2009 Purdue University**

Bachelor's Degree: *Secondary English Education, Minor: Reading*

Academic Honors: Fall 2007, Spring 2008, Fall 2008, Spring 2009

**2014-2015 Purdue University**

Master's Degree: *Strategic Communications and Media Marketing*

Awarded Ceclia Zissis Graduate Student Scholarship

## Contact

Email: missrendant@gmail.com

Cell phone: 630-550-0847

Indianapolis, Indiana area

## Work Experience

Jan. 2017-Present Goodwill of Central & Southern Indiana

**Director, Education Marketing & Communications**

- Worked as a strategic partner with Goodwill Education Initiatives to lead the marketing communication efforts and develop strategies for existing initiatives and expansion of new ones
- Developed marketing plans and strategies, conceptualized, wrote and directed editorial content and developed the online presence for all Goodwill Education Initiatives, Inc. schools
- Coordinated mission awareness strategies, including media relations, development and implementation of communication tools and collaborated with the marketing creative services team as they developed collateral, art, video, graphics and strategies to brand Goodwill Education Initiatives' programs and any further expansion

June 2016-Jan. 2017 Goodwill of Central & Southern Indiana

**Manager, Education Marketing & Communications**

- Planned and executed a wide variety of education and mission awareness communications and activities to strengthen The Excel Center, Indianapolis Metropolitan High School and INISchools' brands
- Responsible for generating research, communications plans, editorial content, media relations, marketing collateral and other materials, advertisements, social media, web content, publications, presentations, videos, and events

## College Work Experiences

August 2006- Aug. 2008

**Undergraduate Teacher Assistant**

**Purdue University**

-Assisted college professor with EDCI 270: Introduction to Education in Technology course at Purdue University

-Recorded daily lab attendance, collected data from projects, monitored exams, worked one-on-one with students, and helped learners complete assigned classroom tasks

-Developed organization data charts and graphs for teacher use

-Required full knowledge and skill with Microsoft Excel, Microsoft Office, Microsoft PowerPoint, Microsoft Movie Maker, Adobe Software, various databases, and completing research on the internet.

## Certifications and Special Interests

- Professional Practitioner Indiana Teaching Certification: English/ Language Arts, Grades 6-12
- Strategic Communications Management Certification (issued by Purdue University)
- *Above and Beyond Award* Recipient at The Excel Center
- Video editing, film-making, interviewing, and focus-group organizing
- Developed multiple professional development presentations, focusing on teaching and brand architeture

## Work Experience Continued

July 2013-June 2016 Goodwill of Central & Southern Indiana

**Lead Teacher & Social Media Coordinator**

- Oversaw all teaching staff at The Excel Center in Lafayette; dealt with scheduling students, attendance audits, data collection, teacher evaluations, training sessions, and school improvement initiatives
- Attended leadership meetings that centered around resolving school conflicts and obstacles, along with providing updates on attendance, student failures, and teacher evaluations
- Organized all social media outreaches; publicized community events and timely promotions; developed brochures, advertisements, and programs to be seen by general public

May 2012-Aug. 2013 Lafayette School Corp. Lafayette, IN

**English Instructor & Drama Club Sponsor**

- Taught English 9, English 10, and College Composition; developed new curriculum and lesson plans that aligned with state standards
- Participated in monthly English department meetings, National Honor Society Selection Committee, and Drama Club/ Speech Team as a co-sponsor
- Mentored new English instructors in the department; met bi-weekly with novice teachers, offered advice, made long-term and short-term strategic improvement plans
- Presented at conferences within the school district

Aug. 2010-May 2012 North White School Corp. Monon, IN

**English Department Head & English Instructor**

- Taught English 10, English 11, English 9, Theater Arts Speech Class, Debate, and Creative Writing; accountable for End of Course Assessment results
- Rendered advice and assistance to employees in the English Department; worked closely with advisors to resolve conflicting matters, salary issues, and scheduling concerns
- Served on the Public Law 221 School Improvement Committee where I helped develop a comprehensive proposal to raise reading comprehension scores for the entire district

Aug. 2009-June 2010 Marion Community Schools Marion, IN

**High School English, Theater, Stage Crew Instructor**

- Taught English 11 and English 9 and generated unit plans on reading comprehension, literary terms, poetry, Shakespearean texts, research projects, MLA citation, vocabulary, grammar, composition, real-life application, and other required state curriculum goals.
- Monitored and prepared analysis of Acuity and ISTEP results for all secondary schools in the district
- Created curriculum mapping, as well as scope and sequence documentation for the Indiana Department of Education newest mandates

# DANIEL SCOTT

**PHONE** xxx-xxx-xxxx **EMAIL** xx@xxx.com

## PROFILE

Business professional with an extensive background in education and politics with a passion for learning and mastering other disciplines. Experience in using data to develop strategic plans and increasing performance to create a stronger business model. Analytical thinker with strong communication skills, leadership, and understanding the connectivity of different divisions.

## TECH SKILLS

Microsoft Office
Business Intelligence
Database Management

## EXPERIENCE

**Director of Data Services,** ***Goodwill Education Initiatives (GEI)*** **May 2012 – Current**

- Crafted and helped pass the new Indiana Adult High School Accountability Model, the first such model in the country
- Worked with the former Executive Director of the The Excel Center (adult high schools at GICI) to introduce industry certifications and shifting the focus from receiving a diploma to career preparation which has resulted in a 50% increase in the number of graduates produced annually and making GICI the largest provider of industry certifications in the state
- Helped develop a culture of data-driven decision making at GICI with a constant emphasis of improvement and advancement
- Managed a team of Project Managers, Data Analysts, and BI Developers for Goodwill education and mission programs

**Data Analyst,** ***Indiana Department of Education (DOE)*** **Jan 2009 – May 2012**

- Crafted Indiana's current state accountability model and No Child Left Behind Waiver (model)
- Helped create an Advancement Placement (AP) incentive plan which resulted in Indiana's AP participation and success to nearly double within two years
- Served on the national Common Core development team
- Despite no prior knowledge and background in education programs or policy, I was able to become one of the most knowledgeable and trusted experts in both of those areas during my three plus years at the Indiana Department of Education

**Voter File Coordinator,** ***Indiana Republican State Committee*** **Jan 2006 – Jan 2009**

- Worked on Governor Mitch Daniel's successful re-election campaign where I was responsible for all of his micro-targeting efforts (the process of using voter mar-ket research to target prospective voters); I was also his national liaison to several campaign groups
- Served on a nationally mandated, state appointed, committee responsible for coordinating all county election office efforts and voter rolls into a single statewide system linked with the Department of Health and Criminal Justice Department
- Helped Indiana develop a national recognized Voter File/Micro-targeting Team; this allowed my team to serve on national (Republican) committees and help set the plan/direction of this area nationwide

## EDUCATION

Bachelor's Degrees in Political Science and History
*Butler University*

## LEADERSHIP DEVELOPMENT

Graduate of Goodwill Industries International Senior Leadership Program Cohort XVI

## GOODWILL PROGRAMS

The Excel Center (adult high school)
Nurse Family Partnership
Goodwill Guides
TalentSource (job placement)

## AGENCY COORDINATION

IN Governor's Office
IN Department of Education
IN Secretary of State's Office
IN Dept. of Workforce Development
IN Election Division
IN State Board of Education
Indianapolis Mayor's Office

# Tonya Taylor

4211 First Flight Circle
Zionsville, IN 46077 USA
Phone: 317.809.4907
E-mail: tonyajtaylor21@gmail.com

## Objective

Experienced educator seeking to leverage extensive background in special education, administration, and teaching in a challenging position. Extremely motivated and eager to contribute to the overall mission of a corporation.

## Education

| | | |
|---|---|---|
| 2013-2014 | Indiana University | Bloomington, Indiana<br>Director of Special Education License |
| 2007-2011 | I.U.P.U.I. | Indianapolis, Indiana<br>Administrative Certification/Principal License |
| *2002-2005* | I.U.P.U.I.<br>Master of Arts | Indianapolis, Indiana<br>Special Education; Mild/Intense Certification |
| *1995-2000* | Univ. of Southern Indiana<br>Bachelor of Science | Evansville, Indiana<br>Elementary K-6 |

## Education Experience

06/12-Present Director of Special Education INISchools
Goodwill Education Initiatives Indianapolis, IN

*Interact, collaborate, and support all school directors, special education site coordinators, and teachers of record of GEI schools and schools receiving special education services through INISchools; Oversee the Special Education Central Office and supervise its staff; Ensure that all Goodwill Education Initiatives' schools and special education staff are implementing all special education procedures and programs to develop and deliver high quality services to students; Monitor compliance for all schools; Direct and advise school directors and staff with specific legal procedures, regulations, legislation and programs that will guide all staff to mold the educational experiences of a diverse group of special needs students to develop and implement supportive, prescriptive, and realistic Individual Education Plans (IEP's) or supportive and modified accommodations for those who qualify under ADA and are above the age of 22*

06/12-06/05 Special Education Department Chair Zionsville West Middle School
Zionsville Community Schools Zionsville, Indiana

*Teacher of Record for students with mild and intense support needs, created over 250 Individual Education Plans and Functional Behavior Plans in compliance with state and national policies and procedures, analyze data to report on annual goals, collaborated with staff on implementation of the RTI (Response to Intervention) model, implemented 1:1 net book program, work closely with ESL student integration program, create and facilitate professional development activities for teachers, participated in Universal Design For Learning Technology grant implementation at district level, used Co-Teaching model, work extensively with staff and parents, supervise a team of 4 special education teachers and 11 paraprofessionals*

***Education Experience Cont.***

08/00-06/05 Classroom Teacher Stout Field Elementary MSD of Wayne Township
Indianapolis, Indiana

*Experience teaching grades four through six in a Title One environment, developed and participated in a co-teaching model for intermediate grades, participated in the implementation of Reading First Grant, Awarded Universal Design for Learning Grant, specialized teaching in language arts, writing, and social studies, taught full inclusion classrooms at each intermediate grade, worked extensively with technology to improve student achievement*

*01/00-05/00* Student Teacher Highland Elementary Evansville-Vanderburgh Corp.
Evansville, Indiana

*Taught grade three and full day Kindergarten, developed and implemented a writers' workshop, attended C.L.A.S.S. professional development, excelled in classroom management strategies, created multiple thematic units, planned and developed units with grade level team, created student portfolio's, worked with ESL and special education learners and managed a support staff of paraprofessionals*

***Additional Activities and Skills***

- Selected to participate in Goodwill Education Initiatives Strategic Leadership Series
- Received 2016 MVP employee award at Goodwill Education Initiatives
- Presenter at Council for Exceptional Children National Conference
- Participated in National Center for Special Education in Charter Schools national convening
- Presenter at Council for Exceptional Children Indiana State Conference
- Recipient of the AEM PATINS Grant
- Active member of CASE, ICASE, and CEC
- Certified in CPI (Crisis Prevention Intervention)

**Claudia Cummings**
**Vice President Workforce and Education**
**Conexus Indiana**

Claudia Cummings is charged with growing and promoting Indiana's advanced manufacturing and logistics skilled workforce. To accomplish this, she is leading the statewide implementation of the industry-driven Hire Technology curriculum, A+ Partner collaborations between companies and schools, Conexus Interns, and "Dream it. Do it." – a national youth outreach campaign inspiring students to pursue advanced manufacturing and logistics careers.

Prior to joining Conexus Indiana, Cummings was Deputy Commissioner at the Indiana Department of Administration where she was responsible for legislative affairs, state contracting and small business development.

Cummings dedicated her early career to public service working as the media relations assistant for the Mayor of Indianapolis, the legislative aide to the Speaker of the Indiana House, Chief-of-Staff to the Marion County Clerk, and press secretary and community relations advisor to the U.S. Attorney for the Southern District of Indiana.

Cummings currently serves on the Goodwill Education Initiatives Board of Directors and the Distinguished Alumni Council for the Indiana University School of Public and Environmental Affairs (SPEA). She has recently been a member of the Indiana Commission on Career and Technical Education and the Indianapolis Local Public Improvement Bond Bank.

Cummings received her Bachelor's Degree from Franklin and Marshall College in Pennsylvania, a Masters of Public Affairs from SPEA, and she completed the Dartmouth College, Tuck School of Business Executive Education Program.

# CHARLES PERRY GRIFFITH JR

| | |
|---|---|
| **Place of Birth:** | Indianapolis, Indiana |
| **Residence:** | 663 Forest Boulevard, Indianapolis, Indiana 46240 |
| **Spouse:** | Nancy "Michelle" Griffith |
| **Children:** | Charles "Perry" Griffith III<br>"Maegan" G. O'Neal<br>"Claire" Helene Griffith |
| **Parents:** | Charles Perry Griffith Sr (deceased)<br>Gerd Jacobsen Griffith |
| **Sibling:** | Wendy Griffith Kortepeter |
| **Education:** | Attended Boston University and Indiana University, Receiving B.S. (1976) and M.B.A. (1978) degrees from Indiana University |

**Professional Career:**

| | |
|---|---|
| Dec 1992 – Present | Chairman, Denison, Inc. & Subsidiaries |
| Oct 1989 – Present | President, Denison, Inc. |
| 1982 – Present | Director, Denison, Inc. |
| Sep 1979 – Sep 1988 | Merchants National Bank & Trust Company<br>Vice President & Senior Account Officer,<br>Commercial Banking Division |
| 1982 – 2010 | WC Griffith Foundation Trust - Advisor |
| 1982 – 1987 | Union State Bank, Carmel, IN – Director |
| May 1988 – Feb 2005 | Benicorp Financial, Inc. – Director,<br>Vice Chairman |
| 2010 – 2014 | Merchants Bank of Indianapolis – Advisory Board Member |
| 2010 – Present | Griffith Family Foundation – President |

**Civic Organizations:**

| | |
|---|---|
| Boys Club of Indianapolis | Past Director |
| Brebeuf Jesuit Preparatory School | Past Trustee |
| Butler University Business School | Past Advisory Board Member |
| Corporate Community Council | Past Member |
| Crown Hill Cemetery | |
| Board of Corporators | Member |
| Board of Managers | Past Chairman |
| Economic Club of Indianapolis | Member |
| Eiteljorg Museum | Past Trustee |
| Goodwill Industries of Central Indiana | Honorary Director,<br>Past Chairman |

| | |
|---|---|
| Goodwill Foundation | Director |
| Goodwill Education Initiatives | Director<br>Past Chairman |
| Greater Indianapolis Progress Committee | Past Director |
| Indianapolis Clean City Committee | Past Director |
| Indianapolis Convention & Visitors Assoc | Director |
| Indianapolis Downtown, Inc. | Director<br>Past Chairman |
| Indianapolis Private Industry Council | Past Chairman |
| Penrod Society | Past Member |
| Riley Children's Foundation | Board Governor,<br>Past Chairman |
| St Vincent Hospital Foundation | Past Director,<br>Past Vice Chairman |
| Sigma Nu Alumni Beta Eta Chapter | Past Director |
| The Hundred Club | Member |
| Washington Township School Foundation | Board Member<br>Past President |

**Social Memberships:**

| | |
|---|---|
| Columbia Club | |
| Maxinkuckee Country Club, Culver, IN. | |
| Maxincuckee Yacht Club, Culver, IN. | |
| Meridian Hills Country Club | |
| University Club | Past President |

**Church Affiliation:**

| | |
|---|---|
| Second Presbyterian Church | Past Deacon |

# BETSY K. DELGADO

C: 317-605-4253
E: bdelgado@goodwillindy.org
5403 Alvamar Pl, Carmel, Indiana 46033

## EXPERTISE

- Secondary & Adult Education
- Human Services
- Nonprofit Management
- Two-Generation Impact
- Strategic Growth
- Funding Diversification
- Funding Expansion
- Replication

## SKILLS

- Macro Analysis
- Micro Execution
- Strategic Planning
- Continuous Quality Improvement
- Partnership Cultivation
- Government Relations & Legislative Advocacy
- Regulatory Compliance
- Leadership Development
- Interpersonal Communication
- Public Speaking

## AWARDS & COMMITTEES

Executive Development Program, *Goodwill Industries International, 2016*

EmployIndy Workforce Board, *City of Indianapolis*

Ascend Fellow, *Aspen Institute, 2015*

Career Pathways Task Force, *Indiana Career Council*

Indiana Early Learning Advisory Council

MCCOY Near West Development Board

Partnership for Early Learning Stakeholders

## EDUCATION

Bachelor of English and Education, *University of North Dakota*

Certification in Leadership, *ProLiteracy*

## SUMMARY

- Strategic, visionary leader with extensive knowledge of and experience in education and human services.
- Nationally recognized adult education and dual generation expert at the forefront of establishing best practices.
- Excellent managerial background with a proven track record for building and implementing sophisticated plans, explicitly supporting business growth and stability.
- Enterprising, creative and driven strategist focused on collaboration, communication, continuous improvement and shared vision.
- High-performing leader with a successful background in delivering full lifecycle implementations within budget and timeframe.

## EXPERIENCE

**Goodwill Industries of Central Indiana** — Indianapolis, IN
Vice President of Mission and Education Initiatives — Present

- Integrated mission and education across Goodwill Industries of Central Indiana Including leadership team and data systems.
- Merger Team to merge southern and central Indiana Goodwill's.
- Documented elements and process for expanding The Excel Center.
- Lead policy and legislative agenda for Goodwill mission and education.
- Secured $750,000 in TANF bridge funding for Nurse-family Partnership.

**Goodwill Industries of Central Indiana** — Indianapolis, IN
Vice President, Mission Advancement — 2013 – 2016

- Aligned Goodwill's services for families, from birth to adult, to better support Goodwill's mission for self-sufficiency.
- Acquired 5 million+ in additional funding for Nurse-Family Partnership and mid-skill training through The Excel Center.
- Managed $10 million diverse mission budget, including reduction in GICI subsidy.
- Identified opportunities to maximize resources, streamline responsibilities and reduce duplication between Mission and Education Divisions, including aligning Disability Services and ex-offender/re-entry program efforts, resulting in $100,000 of savings to the organization.
- Pursued and secured Goodwill's designation as a Center for Working Families, which is a model that helps low-income individuals and families to achieve financial stability.

**The Excel Center, Goodwill Education Initiatives** — Indianapolis, IN
Executive Director — 2011 – 2013

- Managed $27 million budget that incorporated expansion and operations of school from one to nine sites throughout the Greater Indianapolis area.
- Guided charter application process from implementation to evaluation, including drafting charter and legislative testimony, and monitored regulatory compliance.
- Cultivated statewide strategic partnerships with business, education and workforce development organizations to expand opportunities for students.

**Metropolitan School District of Washington Township** — Indianapolis, IN
Community and Continuing Education Assistant Supervisor — 2005 – 2011

- Supervised and administered state and federal grant applications, project budgets and reporting.
- Developed new programs and

# Marianne Glick

**Glick Training Associates**
4111 Wythe Lane, Indianapolis, IN 46250
(317) 577-2311 FAX (317) 841-3226
Email: Marianne@glicktraining.com
URL: http://www.glicktraining.com


## WORK EXPERIENCE:

2005 to Present – Glick Art, Owner/Artist

1985 to 2010: **Glick Training Associates** Indianapolis, IN
President/Owner

2001-2010 Developed Managing for Productivity, 15 module management/supervisory training
Working with Butler University to make Managing for Productivity e-learning course
Conducted training & consulting projects for **Praxair Surface Technologies, Volume Services America, Keller-Crescent, IAAAA, O'Koon Hintermeister**

1999-2001:
* Sexual Harrassment & Diversity training for **Citizen's Gas, F.X. Coughlin, Marvin Johnson & Associates, Allison's, United Way of Central Indiana**
* Needs assessment and training program development for **Central Indiana Council on Aging**
* Needs assessment & training for **Brylane, Jewish Community Center, Boys & Girls Clubs**

1996-1998 **Chrysler Corporation**, Cincinnati Zone Product Trainer.
* Provided training to salespeople for 240 dealerships in Indiana, Ohio and Kentucky.

1994-1995 Developed Diversity Training Initiative for the **City of Indianapolis**
- Delivered training to 325 managers in 1994
- Conducted Train the Trainer for 15 City Training Specialists
- Supervised implementation of training for hourly employees

1993-1994 Managed **BMG Music** reorganization of customer service training
- Developed assessment for screening new employees resulting in a reduction of new employee turnover by 50%
- Revised training curriculum resulting in a reduction in training time from 6 months to 6 weeks
- Supervised on-going revisions and implementation of training

Other Projects:
* Designed, marketed and conducted employee development training seminars
* Provided consulting services to property management companies
  - Developed employee handbook & procedures manual
  - Screened and hired new employees
  - Performed shopping surveys and property inspections

9/81 - 5/85 **Concepts Cable** Indianapolis, IN
President/Owner
Responsible for operation of company servicing 1,500 cable TV subscribers including procedures, profits and computerized billing. Sold company with favorable return to investors.

3/77 - 8/81 **Gene Glick Management Corp.** Indianapolis, IN
Regional Property Manager
Supervised total operations of 12 apartment projects including budgets, rent increases, financial statements, audits, training, personnel and communications. Successfully turned around project from 50% to 97% occupancy in 18 months. Projects included conventionally financed, 221 D-3, 236, Section 8, Section 8 Elderly and D-4.

## EDUCATION:

**Butler University**
Master of Science, 1974 : Major: Educational Psychology
Bachelor of Science, 1972: Major: Elementary Education

# VOLUNTEER ACTIVITIES

9/2011 – CENTER ON PHILANTHROPY AT IU, Board of Visitors

6/2007 to Present **– EUGENE & MARILYN GLICK FOUNDATION – Board Vice Chair**

2007 to Present **– GENE GLICK COMPANY – Board of Directors**

2/2006 – Present **BALL STATE UNIVERSITY – BOARD OF TRUSTEES**

1989 – 1995 & 2010 - Present **UNITED WAY OF CENTRAL INDIANA**

**Campaign Chair 2011**

- Board of Directors, Executive Committee, Allocations Committee, Capital Needs Committee
- First Female Chairperson for Women's Division of Annual Campaign
- Chairperson and Founder of Executive Women's Leadership Program
- .Women's Initiative Steering Committee 2006 to Present
- Moderator for Executive Women's Leadership Program 2006-2007
-

2006 – 2007 **DRESS FOR SUCCESS**

. Stepping out in Style – model 2006 – Honorary Chair for 2007

2004 - Present **WOMEN'S FUND OF CENTRAL INDIANA –**

**.** Chairman Women's Fund Dinner 2006

2003-Present **PREVENT BLINDNESS INDIANA (Board of Directors)**

**Chairman of the Board beginning 4/2006-3/2008**

2003-2006 **BUTLER UNIVERSITY COLLEGE OF Business (Board of Visitors)**

2004-2006 **Children's Bureau of Indiana Board of Directors**

1999-2003 **HABITAT FOR HUMANITY (Board of Directors)**

.Co-chair 25th Anniversary Celebration

1999-Present **ST. LUKE'S UNITED METHODIST CHURCH**

. Member and Facilitator for Leadership Team for "The Garden"

1998-2000 **SPEAKING OF WOMEN'S HEALTH**

Co-chair of event coordinating convention center logistics

1991-Present **PRO-100** (Summer Program for Disadvantaged Youth)

**.** Assisted with development of curriculum for improving self-esteem & training for coaches

1993-1995 **WFYI - Channel 20**

- Board of Directors, Personnel Committee, Community Relations Committee
- Conducted Management Development Training for Executive & Managerial Personnel

1993-1995 **BETTER BUSINESS BUREAU**

- Board of Directors - Vice-President, Executive Committee 1995
- Education Committee

1991-1994 **BIG SISTERS**

- Board of Directors - Chairperson, Board Development Committee
- Conducted Management Development Training for Staff

1992-1994 **NETWORK OF WOMEN IN BUSINESS**

- Board of Directors - Chairperson, Executive Club

* Business Woman of the Year 1993

1991-1994 **WOMEN'S HOSPITAL OF INDIANAPOLIS**

- Board of Directors - Chairman of the Board of Directors, 1994

1987 - 1992 **CENTRAL INDIANA CHAPTER OF THE AMERICAN SOCIETY FOR TRAINING & DEVELOPMENT**

- Board of Directors - Chairperson, Networking Committee, 1992
- Regional Conference Committee member and speaker for regional conference

1986-1989 **WOMEN'S BUSINESS INITIATIVE**

- Board of Directors - President of the Board of Directors, 1987
- Annual Conference Chairperson 1987-1989

1988-1990 **INDIANA SMALL BUSINESS COUNCIL**

- Board of Directors - Co-Chairperson, Governor's Conference on Small Business 1990

**RICHARD W. HORN**

280 E. 96th Street, Suite 160
Indianapolis, IN 46240

(317) 819.1888 Work
(317) 258.7424 Home
rhorn@strategiccapitalpartners.net

***PROFESSIONAL EXPERIENCE***

**The Stratford Companies** Indianapolis, IN — January 2006 - Present
*A continuing care retirement community developer and operator*

- **Chairman**
  Stratford developed and operated three continuing care retirement communities representing over $250 million. Stratford's operations employed over 250 employees.

**HORN PROPERTIES, LLC** Indianapolis, IN — July 2002 - Present
*A real estate investment and development company which seeks value-added opportunities in real estate focusing on office, industrial, land and senior housing.*

- **President**
  Developed a 56-acre business park in Plainfield, Indiana adjacent to the newly constructed Indianapolis International Airport midfield terminal entrance. Upon completion the project will contain 800,000 square feet with $50 million in development.

  In conjunction with Brenwick Development, completed large land transactions with Pulte Homes, Ryland Homes and Beazer Homes selling improved residential lots valued in excess of $50 million.

**DUKE REALTY CORPORATION,** Indianapolis, IN — May 84 to Jul 02
*A $7 billion REIT (real estate investment trust) DRE/NYSE*

- **President**
  Responsibilities:
  Operated and managed all of the income/production side of Duke Realty Corporation including all development, acquisitions and dispositions of land and buildings. Portfolio totaled over 100 million SF in thirteen Midwest and Southeast U.S. cities with a market value in excess of $7 billion.

- **Executive Vice President - Office Division**
  Responsibilities:
  Operated and managed all aspects of the office development, leasing, and investment business for all of Duke's Midwest office operations. Responsible for 20 million square foot portfolio with a market value of $2 billion, representing 50% of the company's income at that time. Supervised over $1 billion in development starts.

- **Vice President-Acquisitions**
  Responsibilities:
  Held total responsibility for all aspects of acquiring income producing, commercial properties (office, industrial and retail) including determining strategy, negotiating purchase agreements, performing due diligence, financing and closing the transaction. Completed in excess of 50 transactions valued at over $2 billion.

***EDUCATION***

**INDIANA UNIVERSITY**, Bloomington, IN

J.D., 1984 - Financed 100% expenses
MBA, 1984 - Financed 100% expenses
B.S., 1980 - Financed 75% expenses

***AFFILIATIONS AND AWARDS***
Carmel Dad's Club
Young President's Organization (YPO)
World President's Organization (WPO)
Urban Land Institute (ULI)
NAIOP
Beta Gamma Sigma (honorary business fraternity)
Sigma Alpha Epsilon
-Chapter President
-Leadership Award 1980
National Entrepreneurship Foundation
United Way
Rebuilding Together

***INTERESTS***
Family, physical fitness, travel, current events, investments

**JILL ROBINSON KRAMER**
6426 Harrison Ridge Boulevard
Indianapolis, IN 46236
317.506.4464 (cell)
Kramer.jillr@gmail.com

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**Professional Experience**

March 2017 – Present **Strada Education Network**

***Vice President for Operation Strategies***

- Performs research, analysis, evaluation, and planning for the corporate operating companies.
- Manages corporate leadership meetings – shared service reviews and monthly business reviews.
- Creates and manages operating company reporting and dashboard for presentation to senior leaders and the board of trustees.
- Builds external relationships and manages partnerships on behalf of the chief executive officer and chief operating officer.

2010 – February 2017 **Ivy Tech Community College of Indiana**

***Associate Vice President for Planning & Grants***

***Associate Vice President for Research & Planning***

- Develop a Balanced Scorecard strategic plan for a state-wide higher education system.
- Lead the implementation of key student success, diversity, and process initiatives.
- Monitor and report on performance metrics for internal and external audiences.
- Manage Grant Office and Planning Staff that raises more than $20 million annually.
- Manage and facilitate College leadership meetings and state board of trustees meetings.
- Represent the office of the president in the community, higher education and policy sectors.
- Use data, reports, accreditation requirements, and planning outcomes to drive change.

2016 **Ferris State University**

***Adjunct Faculty, School of Graduate Studies***

- Co-taught Strategic Planning for the Comprehensive Community College.

2016 **JR Kramer Consulting**

***Owner and Principal***

- Facilitated and led community-leader discussions around a pre-K to workforce continuum.
- Developed ideas to close achievement gaps and improve equitable outcomes.

1999 – 2010 **Lumina Foundation for Education**

***Senior Program Officer***

- Managed a grant portfolio exceeding $26 million focusing on access and success in postsecondary education, especially for low-income, first-generation, Hoosier, and underrepresented students.
- Advised, evaluated, convened and connected grantees with relevant resources across the United States, Canada and Europe.
- Constructed work opportunities for and supervised interns and graduate assistants.

- Led annual and strategic planning efforts for grant-making teams focused on building capacity in the philanthropic sector, Indiana work and high school to college transitions.
- Initiated a successful grant program to expand Advanced Placement, International Baccalaureate and dual credit programs at 39 public high schools in Indiana and focusing on achievement gaps.
- Created the first grant application forms, review processes, policies and reports for Lumina Foundation during its creation.

1998 – 1999 **The Hudson Institute, Indianapolis, Indiana**

***Associate Director of Special Events***

- Increased board donations for special events.
- Assisted in all aspects of planning and implementing major fund raising events.
- Planned logistics for in-house policy briefings, book discussions and lectures.
- Supervised interns and consultants.

**Education**

2014-present **Indiana State University, Terre Haute, IN**
Ph.D. Candidate in Education Leadership Administration

2014 **Marian University, Indianapolis, IN**
Academy for Leadership and Learning, Post-Master's Foundational Certificate

2011 **George Washington University College of Professional Studies, Washington, DC**
Certificate, Balanced Scorecard Professional

1999 **Indiana University Purdue University Indianapolis**
M.A. Philanthropic Studies

1998 **Hanover College, Hanover, IN**
B.A. in Communication and Spanish, cum laude, History minor

**Select Leadership and Volunteer Activities**

| | |
|---|---|
| 2017 – Present | Board Member, Goodwill of Central and Southern Indiana |
| 2016 – Present | Appointed Member, Indiana Charter School Board Association |
| 2016 – Present | Volunteer, Parent Faculty Organization, Fall Creek Valley Middle School |
| 2016 – Present | Volunteer, Oaklandon Youth Organization |
| 2016 – Present | Volunteer, Me & Korea |
| 2013 | Recipient, Distinguished Young Alumni Award, Hanover College |
| 2011 – Present | Volunteer Committee Co-Chair, Forest Glen Elementary PFO |
| 2010 – Present | Member, Indiana Afterschool Network board of directors and past chair |
| 2008 – 2014 | Board Member, United Way of Central Indiana |
| 2006 – Present | Grant Reviewer, Ball Venture Fund at Independent Colleges of Indiana |
| 2007 – 2011 | Board Member, Indiana Grantmakers Alliance |
| 2007 – 2011 | Board Member, Castleton United Methodist Nursery School |
| 2008 – 2011 | Grant Reviewer, Susan Komen Foundation, Indianapolis Chapter |
| 2008 – 2010 | Grant Reviewer and Committee Member, Indiana Achievement Awards |
| 2008 – 2010 | Scholarship Committee Reviewer, Summer Youth Program Fund |
| 2002 – 2010 | Member, National Rural Funders Collaborative Steering Committee |
| 2004 – 2010 | Member, Asian Americans and Pacific Islanders in Philanthropy |
| 2003 – 2004 | Member, Class XXVIII Stanley K. Lacy Executive Leadership Program |
| 2000 – 2002 | Board Member, Vivian Smith House, Inc. |
| 1999 – 2004 | Volunteer, Indy Reads |

# Kent A. Kramer

1630 Quail Court, Pendleton, IN 46064 | (317)490-7190 | kkramer@goodwillindy.org | linkedin.com/Kent Kramer

Executive Leadership | Multi-Faceted Business Operator | Social Entrepreneur

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Visionary President and Chief Executive Officer offering 20+ years of leadership experience in for-profit and not-for-profit businesses. Proven success at engineering strategy and developing business initiatives with a focus on growing market share in new markets and driving mission throughout business units. Servant leader that has built successful teams that accomplishes goals, develops people, and has a strong focus on accountability and gaining results.

**Successes - Executive Leadership**

- Lead a social services team of 8 direct reports with responsibilities for 3,850 employees, 3,500 students, 1,000+ clients, 73 retail stores, 12 high schools, 11 contract sites and several distinct mission service areas generating $155 million in annual revenue.
- Guided diverse, multi-divisional organization through an in-depth 5 year strategic planning process, delivering comprehensive plan that was unanimously approved by 3 autonomous Board of Directors.
- Lead and facilitate a bi-weekly cross-organizational executive staff meeting devoted to communicating corporate vision and direction while prioritizing and aligning resources. Successful outcomes include; establishing strategies to offset the impact of the Affordable Care Act, developing an organization wide mid-level leadership bonus plan, and vetting through ways to improve corporate communications.
- Developed and executed an aggressive strategic growth plan where the retail division revenue increased from $25.6 to $82.1 million, with net income improving from $6.9 million to $17.1 million, over an 11 year period. Store count for the Retail division increased from 25 to 57 stores during the same period. Efforts generated an additional 1,400+ jobs, many for people with multiple barriers to employment.
- Provided vision and executed the consolidation of 5 disparate human services programs into a holistic Mission Advancement division, focused on building synergies and producing impactful outcomes. Team will deliver services to 2,500 clients, while reducing the budgeted subsidy requirement by $130,000.
- Aligned operations, information technology, accounting and marketing divisions to develop an organization-wide customer loyalty program (500,000 members) that achieved the primary goal of increasing the average customer transaction by $0.50. Resulted in an additional $2.5 million in revenue.
- Implemented a Board directive to design a new customer satisfaction program (internal and external) that measures results and provides direct feedback to all operating and support divisions. Resulted in all business functions and support divisions participating in a robust internal customer satisfaction program.

**Successes - Multi-Faceted Business Operator**

- Developed the start-up of a successful staffing company focused on placing individuals served through multiple Goodwill mission oriented divisions. Outcomes year one showed a 26% increase in external job placements and an 11% increase in starting wages for those served.
- Negotiated for, and delivered 35 new retail sites through demographic, traffic and retail penetration studies. All sites producing above projections, while delivering an additional $10.2 million in net income on an annual basis.
- Designed point-of-sale “round up” fundraising program. On target to raise in excess of $750,000, which will in turn fully fund 6 Goodwill Guides and their expenses for the retail division.

## Successes - Social Entrepreneur

- Developed and launched a new eBook operation that sold over 70,000 books and generated in excess of $700,000 in revenue the first year, and has grown to nearly $3.5 million in revenue in year 5.
- Proposed and received approval from the Board of Directors to invest in an innovative transportation model that turned a cost center into a profit center. Generated 150 additional job opportunities. Model has been replicated by multiple Goodwill organizations throughout North America.
- Initiated internal initiative for a new recycling model that has resulted in a 50% reduction in the volume of waste being disposed of in landfills, and created 15 Green jobs for the organization.
- Executed a continuously evolving strategy to grow the eCommerce division from a 2 person $180,000 operation to a 120 employee $9 million division over a period of 10 years. Operation now receives 10-15 benchmarking visits from other Goodwill agencies that wish to replicate our successful model.
- Developed a startup business services (building and grounds) model that is targeted to produce $315,000 in revenue and save the internal customer (retail) 10% in facility upkeep expenses; while creating a training laboratory that will lead employees with limited vocational options towards economic self-sufficiency.
- Integrated resources (Guides and TalentSource) into The Excel Center network, driving significant results in the performance metrics (placements, retention, and wage gain) of the graduates.

## Professional History

**Goodwill Industries of Central Indiana, Inc.** **October 2002 - Present**
President and Chief Executive Officer (2015 to present)
Senior Vice President, Chief Operating Officer (2012 - 2015)
Vice President, Retail Operations (2002 - 2012)

**Kmart Stores** **June 2000 – October 2002**
District Manager
*Led 20 store division in central Indiana*

**Sam's Club, division of Wal-Mart Stores, Inc.** **June 1990 – June 2000**
Store/District/Regional Management – New Jersey, Pennsylvania, and Indiana
*Responsible for division that delivered $300 million in annual revenue*

## Education

**Anderson University – Falls School of Business** **Aug 2011 – June 2013**
Anderson, IN - Master's in Business Administration

**Goodwill Industries International Executive Leadership Program** **Feb 2009 – June 2010**
Rockville, MD

**Indiana State University – Scott College of Business** **May 1985 – May 1990**
Terre Haute, IN - Bachelor of Science, Business Management
*Sigma Nu Vice President, Student Government Senator, Leadership Task Force*

# Rose M. Mays, PhD, RN

ABBREVIATED CURRICULUM VITA


| | |
|---|---|
| Address | 12053 Stern Drive, Indianapolis, IN 46256 |
| Phone | 317-842-3643 (home) |
| E-mail | rmays@iupui.edu |


## EDUCATION

| | |
|---|---|
| 1967 | BSN, Nursing, University of Evansville, Evansville, IN |
| 1973 | Certificate, Pediatric Nurse Practitioner, Indiana University, Indianapolis, IN |
| 1974 | MSN, Pediatric Nursing, Indiana University, Indianapolis, IN |
| 1979-80 | Clinical Fellowship, Adolescent Health, University of Maryland, Baltimore, MD |
| 1987 | PhD, Nursing Science, University of Texas, Austin, TX |
| 1999-2000 | Post-doctoral Research Fellowship, University of Pennsylvania, Philadelphia, PA |

## LICENSURE

| Type | Number | State/Organization |
|---|---|---|
| RN | 280046378A | Indiana/Health Professions Bureau |

## WORK EXPERIENCE

### Academic Appointments

| | |
|---|---|
| 1973-1977 | Assistant Professor, Indiana University School of Nursing |
| 1977-2004 | Associate Professor, Indiana University School of Nursing |
| 1992-2009 | Faculty, Leadership in Adolescent Health Program, Indiana University School of Medicine |
| 2001-2009 | Associate Dean for Community & International Affairs, Indiana University School of Nursing |
| 2004-2009 | Professor, Indiana University School of Nursing |
| 2010-present | Professor Emeritus, Indiana University School of Nursing |

### Clinical Appointments

| | |
|---|---|
| 1967-1968 | Head Nurse, Central State Hospital, Indianapolis, IN |
| 1968-1970 | Assistant Head Nurse, Veterans' Administration Hospital, Indianapolis, IN |
| 1970-1972 | Public Health Nurse, Marion County Public Health Department, Indianapolis, IN |
| 1976-1983 | Pediatric Nurse Practitioner, Marion County Public Health Department, Indianapolis, IN |
| 1978 | Pediatric Nurse Practitioner, Indiana Family Health Council, Migrant Health Program, Indianapolis, IN |
| 1985-1986 | Pediatric Nurse Practitioner, Indianapolis Day Nursery, Indianapolis, IN |
| 1986-1992 | Senior Nurse, Riley Hospital Child Development Center, Indianapolis, IN |

## COMMUNITY BOARD SERVICE (Since 2000)

| | |
|---|---|
| 2001-2005 | Member, Clarian Health Community Advisory Council |
| 2000-2004 | Honorary Co-Chair, IUPUI Comprehensive Campaign<br>Member, Leadership Committee, School of Nursing Comprehensive Campaign |
| 2002-2005 | Co-Chair, Operations Board of Indianapolis Friendly AccessSM Coalition |
| 2003-2004 | Member, Marion County Child Protection Team |
| 2003-2008 | Board Member, Planned Parenthood of Greater Indiana |
| 2004-2005 | Member, Mayor's Indy In Motion Advisory Council |
| 2005-present | Board Member, Avondale Meadows & Vision Academy Charter Schools<br>Board President, 2009-2012 |
| 2006-2011 | Member, Interagency State Council on Black & Minority Health, ISDH |
| 2006-2010 | Member, Adolescent Health Coalition, ISDH |
| 2007-2010 | Advisory Board Member, Future Promises Program for Pregnant and Parenting Teens |
| 2009-present | Board Member, Methodist Health Foundation |
| 2012-present | Board Member, Indiana University Foundation |
| 2013-2014 | Co-chair IU School of Nursing 100th Anniversary Committee |

## COMMUNITY RECOGNITIONS

| | |
|---|---|
| 1988 | Achievement in the Professions Award, Center for Leadership Development |

| | |
|---|---|
| 1991 | Forum Series Honoree, Girls Incorporated of Indianapolis |
| 1999 | Distinguished Service Award, IU School of Nursing Alumni Association |
| 2004 | Medal of Honor, University of Evansville |
| 2004, 2005, & 2007 | Featured, *Who's Who In Black Indianapolis* |
| 2006 | Hoosier Heritage Lifetime Achievement Award, Heritage Place |
| 2009 | Sagamore of the Wabash Award, Indiana Governor Mitch Daniels |
| 2009 | Spirit of Philanthropy Award, IUPUI |
| 2010 | Rosa Parks Trailblazer Award, Indiana Minority Business Magazine |
| 2010 | Distinguished Alumna Award, University of Evansville Alumni Association |
| 2010 | Living Legends Award, Indiana Historical Society |
| 2010 | Indiana Lt. Governor's Leadership Award, Girl Scouts of Central Indiana |
| 2012 | Whitney M. Young, Jr. Service Award, Crossroads of America Council Boy Scouts of America |
| 2014 | Top 100 Alumni, Indiana University School of Nursing |
| 2015 | Maynard K. Hine Medal, Indiana University Alumni Association |
| 2015 | Medal of Honor (with W.G. Mays), Indiana University |
| 2015 | Inducted, Indiana Academy, Independent Colleges of Indiana |

**REFEREED PUBLICATIONS**

1. **Mays, R.M.** (1982). Health issues of childhood. In S. L. Tyler and G. M. Woodall, *Female health and gynecology across the life span*, Bowie, MD. Robert J. Brady, (93-108).
2. **Mays, R.M.** & Gillon, J. E. (1993). Autism in young children: An update. *Journal of Pediatric Health Care*, 7, 17-23.
3. **Mays, R.M.** & Orr, D.P. (1996). Psychosocial development in adolescence. In V. I. Rickert (Ed.) *Adalescent nutrition: Assessment and management,* New York, Chapman & Hall.
4. Webb, P., Zimet, G., Fortenberry, J.D. & **Mays, R.** (1999) HIV immunization: Acceptance and anticipated effects on sexual behavior among adolescents. *Journal of Adolescent Health, 25*, 320-322.
5. **Mays, R.M.,** Zimet, G.D., Winston, Y., Kee, R, Dickes, J. & Su, L. (2000) Human papillomavirus, genital warts, pap smears, and cervical cancer: Knowledge and beliefs of adolescent and adult women. *Health Care of Women International 21*, 361-374.
6. Zimet, G.D., **Mays, R.M.** & Fortenberry, J. D. (2000) Vaccines against sexually transmitted infections: Promise and problems of the magic bullets for prevention and control. *Sexually Transmitted Diseases, 27*, 49-52.
7. Zimet, G.D., **Mays, R.M.,** Winston, Y., Kee, R., Dickes, J., & Su, L. (2000) Acceptability of HPV immunization. *Journal of Women's Health & Gender-Based Medicine, 9*, 47-50.
8. **Mays, R. M.** (Test Item Contributor) J. A. Fox & L. Gilman, (2001*) Pediatric nurse practitioner certification review*, St. Louis, Mosby.
9. Cobb, K., Billings, D., **Mays, R.,** Canty-Mitchell, J. (2001) Peer review of online teaching in nursing. *Nurse Educator*, 26, 274-279.
10. **Mays, R.M.,** Sturm, L.A. & Zimet, G.D. (2001) Parental perspectives on vaccinating children against sexually transmitted diseases. *International Journol of STD & AIDS, 12* (Supplement 2), 194 (abstract).
11. Zimet, G.D. & **Mays, R.M.** (2001) Immunizing adolescents against HIV, genital herpes & mononucleosis: The attitudes of nurse practitioners. *International Jaurnal of STD & AIDS, 12* (Supplement 2), 194 (abstract).
12. **Mays, R.M.**, Sturm, L. & Zimet, G.D. (2004) Parental perspectives on vaccinating children against sexual transmitted infections. *Social Science and Medicine, 58*, 1405-1413.
13. **Mays,** R.M. & Zimet, G. (2004) Recommending STI vaccination to parents of adolescents: The attitudes of nurse practitioners. *Sexually Tronsmitted Diseases, 31,* 428-432.
14. Zimet, G.D., **Mays, R.M.**, Sturm, L.A., Ravert, A.A., Perkins, S. & Juliar, B. (2005) Parental attitudes about sexually transmitted infection vaccination for their adolescent children. *Archives of Pediatrics and Adalescent Medicine, 159*, 132-137.
15. Zimet, G.D., Perkins, S.M., Sturm, L.A., Bair, R.M., Juliar, B.E. & **Mays, R.M.** (200S) Predictors of STI vaccine acceptability among parents and their adolescent children. *Jaurnal of Adalescent Health, 37*, 179-186.
16. Sturm, L.A., **Mays, R.M.** & Zimet, G.D. (2005) Parental beliefs and decision making about child and

adolescent immunization: From polio to sexually transmitted infections. *Journal of Developmental and Behavioral Pediatrics, 26*, 441-452.

17. Bair, R.M., **Mays, R.M.**, Sturm, L.A., Perkins, S.M., Juliar, B.E. & Zimet, G.D. (2008) The acceptability of sexually transmitted infection vaccination to Latino parents. *Ambulatory Pediatrics, 8, 98-103*.
18. Burrage, J, Zimet, G.D., Cox, D.S., Cox, A.D., **Mays, R.M.**, Fife, R.S. & Fife, K.H. (2008) The Centers for Disease Control and Prevention revised recommendations for HIV testing: Reactions of women attending community health clinics. *Journal of the Association of Nurses in AIDS Care*, 19, 66-74.
19. Bair, R.M., **Mays, R.M.**, Sturm, L.A. & Zimet, G.D. (2008) Acceptability of sexually transmitted infection vaccination among Latina mothers. *Journal of Pediatric & Adolescent Gynecology, 21*, 329-334.
20. Sturm, L.A., **Mays, R.M.**, Juliar, B.E., Bair, R., Perkins, S.M. & Zimet, G.D. (2008) 'What, me worry?' Parents' reasons for worry/nonworry about adolescent risk for sexually transmitted infections (STI). *Journal of Health Psychology*, 13, 1060-1071.
21. Shieh, C., **Mays, R.**, McDaniel, A. & Yu, J. (2009) Health literacy and its association with the use of information sources and with barriers to information seeking in clinic-based pregnant women. *Health Care for Women International, 30*, 971-988.
22. **Mays, R.M.**, Sturm, L.A., Rasche, J.C., Cox, D.S., Cox, A.D. & Zimet, G.D. (2011) Use of drawings to explore US women's perspectives on why people might decline HIV testing. *Health Care for Women International, 32*, 328-342.
23. Stockwell, M.S., Rosenthal, S.L, Sturm, L.A, **Mays, R.M.**, Bair, R.M., Zimet, G.D. (2011) The effects of vaccine characteristics on adult women's attitudes about vaccination: A conjoint analysis study. *Vaccine, 29*, (27), 4507-4511.
24. Bell, C.J., Zimet, G.D., Hinds, P.S., Broome, M.E., McDaniel, A.M., **Mays, R.M.**, Champion, V.L. (2017) Refinement of a conceptual model for adolescent readiness to engage in end-of-life discussions. *Cancer Nursing*, (in press)

# JARL (JAY) OLIVER MSM, CWS

11304 FALLING WATER WAY FISHERS IN 46037

PHONE 317-903-8897

JOLIVERFINANCE@GMAIL.COM

## NON FOR PROFIT VOLUNTEER EXPERIENCE

**January 2014-Current Goodwill Indianapolis, IN**

***Goodwill Young Leaders Board/ Steering Committee Leader (Elected Position)***

- Succesfully establish and lead a group of members who support Goodwill's Mission and Values
- Construct a Mission group to produce new young leaders
- Form an Advocacy committee to help spread Goodwill's Mission and Values/ Create events that will raise funds for Goodwill
- Establish a Development committee to help develop Goodwill programs and align them to Goodwill's Young Leaders
- Communicate and deliver quarterly and yearly reports to Board Members and Foundation Board

**January 2014-Current Goodwill Indianapolis, IN**

***Goodwill Young Leaders Board/Advocacy Committee Chairman (Elected Position)***

- Form an Advocacy committee to help spread Goodwill's Mission and Values/ Create events that will raise funds for Goodwill
- Responsible for holding monthly meetings with committee members to create and establish Advocacy of Goodwill programs to young leaders and the community
- Properly plan and execute outside engagements and keep great relationships with outside companies, donors and potential leaders to raise funds and awareness

**January 2010 -2013 Promising Future of Central Indiana Noblesville, IN**

***Promising Future Martini Party Committee Member***

- Work in collaboration with committee members to strategically plan the largest fund raising event for Promising Futures
- Use personal and business network to obtain auction items, donations, staff the event including restaurants with donated food and beverages

- Work with Board Members to create marketing material
- Set budget, goals and communicate expectations to Board
- Build relationship with outside vendors to make sure event is fun, consistent with years past and profitable with a net income of 100K to 150K per year

## FOR PROFIT EXPERIENCE

**March 2014-Current** **Regions Bank** **Indianapolis, IN**

***Vice President Private Wealth Advisor***

- Successfully created a book of 85 affluent clients by networking with internal and external COIs
- Work with Portfolio Manager to help clients invest their funds depending on their risk tolerance
- Work with the Trust Department to help clients fulfill their wishes depending on their Trust needs
- Set and understand precall plan meetings including, investigate client's background, setting agendas and present to clients.
- Build relationships with customers and clients to understand their needs, goals and potential aspirations
- Quarterback clients relationship to interpret needs and connect them to business partners internally and externally to help them achieve their goals
- Understand financials to protect the bank from risk while building large investment, lending and deposit portfolio
- Travel covering Indianapolis, Southern Indiana, Illinois, Tennessee and some travel to cooperate office in Birmingham
- Set and prepare joint calls with CEO and VP of Marketing to establish and secure Wealth clients and set strategies to build new relationships.

**2009-2014** **Regions Bank** **Noblesville and Indpls, IN**

***Assistant Vice President Branch Manager***

- Manage staff to keep an operationally sound and compliant branch
- Properly plan and execute outside BTB sales calls to generate new business and keep great relationships with clients and prospects
- Build Denovo (new build) Branch and bring it to profitability
- Consistently obtain goals to bring profit to branch
- Manage branch of loans and deposits of 50 Million +

**2004-2007 Union Federal/Sky Bank/Huntington Indpls, IN**

***Mortgage Rep.***

- Network with Realtors, Branches and past clients to build book of business
- Consistently close 1 million in Mortgage loans monthly
- Coach and educate homeowners to help make purchase and refinance their life dreams

**2001-2004 Art Institute Of New York City NY, NY**

**Student Accounting Coordinator**

- Balancing all ledgers
- Put into practice Sarbane Oxley and made sure we were within compliance.
- Assisted the Finance Director with Payables and Collected on all Receivables.
- Work with students to keep them with their financial aid goals
- Help students to maintain Grants
- Work with students on payment plan

## EDUCATION

B.S. Business Honors Degree Indiana Wesleyan University Marion, Indiana

Masters of Science in Business Management Indiana Wesleyan University, Marion , Indiana

## COMMUNITY INVOLVEMENT AND SKILLS

Real Estate Broker License, Certified Wealth Strategist, Life and Health License

# DONALD L. *(DON)* PALMER

## ● Visionary ●Founder ● Consultant ● Business Executive ●Board Member ● Community Leader

Don Palmer has over 30 years of experience in business, organizational development, entrepreneurship, private equity investing, and service on numerous corporate and non-profit boards.

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As managing partner of Honey Creek Capital *(honeycreekcapital.com),* Don invests in small and mid-market businesses by providing value added services to maximize investment return. This includes strategic planning, management training and advisory role activities.

Don is a partner in Equipment Technologies *(apachesprayer.com),* a middle market agricultural equipment manufacturer (Mooresville, IN), the largest independently owned self-propelled sprayers in North America. It operates out of a 108,000 square foot headquarters incorporating common model parts, resulting in faster production, less inventory on shelves and more affordable sprayers. Distribution is through a direct sales force and independent dealers in North America.

He is also a long-time partner in Palmer Truck Group *(palmertrucks.com),* middle market retail and leasing truck business with eight locations in the Midwest – Indiana/Ohio privately owned company with 500 employees specializing in top quality Kenworth trucks, parts and service. Don is also an investor in Cardinal Equity, Command Equity and Tillery Capital.

In 2011-12, Don served as Interim Chief Operating Officer for the Heartland Film Festival – Truly Moving Pictures based in Indianapolis. He played a major role in transitioning the organization to a higher level of excellence through restructuring, funding enhancement, budget accountability and operational efficiencies.

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Don was active for 30 years with Palmer Automotive Group, a family-owned, retail automobile business in Indiana. He served as President & Chairman of the automotive. The company had experienced $75M in sales at three locations, including Chrysler, Dodge and Hyundai franchises, a rental car company, commercial vehicle/in-house leasing businesses, and collision repair.

He began his career as a sales representative with Xerox Corporation, and then entered the vehicle business as Controller, Secretary & Treasurer with Kenworth of Cincinnati, a commercial truck company providing sales, leasing, and service.

**Palmer's career service on boards of directors includes:**

- Equipment Technologies – *Mooresville, IN*
- Fifth Third Bank – *Indiana; Executive Committee*

### Areas of Expertise

- Family business management
- Dealership negotiation and management
- Automotive consumer sales
- Fleet sales
- TV and radio advertising
- Automotive parts, service, and collision management

### Industry/Sector Experience

- Automotive
- Farm Equipment
- Motorcycles
- Banking
- Private equity
- Higher Education

### Functional Experience

- Board of Directors
- General Management
- Budget & Cash Flow Analysis
- P&L Management
- Staff Development
- Non-Profit Leadership

### Education

Faculty (Adjunct), Indiana Wesleyan University, Indianapolis; Faculty (Adjunct), Northern Kentucky University; Board Member, Indiana University Business Alliance; and Adjunct Instructor, Taylor University

# DONALD L. *(DON)* PALMER

- Hudson Aquatic Pools – *Angola, IN (manufacturer of therapy pools for physical therapy and veterinary market)*
- Three Witt Enterprises – *fast-growing, 15-restaurant chain in Ohio and South Carolina*
- Activate Healthcare – *Indianapolis (Founding Member & a Managing Partner for on-site employer healthcare and wellness company)*
- VRCG, Inc. – *Royal Oak, MI (helps auto dealerships and rental car companies become more efficient and profitable)*
- Cheeseman Trucking – F*ort Recovery, OH (mid-market commercial carrier)*
- Ahaus Engineering – *Richmond, IN (mechanical engineering firm that designs and manufactures custom products)*
- Qualtronics – *Columbus, IN (high-quality wiring harness manufacturer)*
- World Presidents Organization, *Indiana Chapter (Chapter Chair, Education Chair, Forum Moderator)*
- Opportunity International - (*Treasurer, Marketing Chair, Audit Committee Chair); Opportunity International provides small business loans, savings, insurance and training to over two million people working their way out of poverty in the developing world.*
- Opportunity Transformation Investments (*Board Member) - OTI is a below-market investment program managed by the Calvert Social Investment Foundation. The fund makes equity, loan and debt securities investments in microfinance institutions (MFIs) worldwide.*

**D**on's passion for teaching and education includes service as: Executive in Residence, Taylor University MBA Program; Indiana Wesleyan Entrepreneur in Residence and instructor in strategic management; Indiana University Kelley Graduate School of Business private equity project with Dr. Bill Haeberle and Sophwiki mentoring program; Indiana University Business Alliance (Board member); Northern Kentucky University marketing instructor; Aileron Guest Instructor – "How to be an Effective Board Member"

**L**eadership has been an important component of Palmer's career and personal life, including co-founding the National Christian Foundation of Indiana, co-founding the Indianapolis Faith Leadership Series and the Barnabas Fund (Chair) through the Central Indiana Community Foundation. Don and his wife, Carolyn, are parents of a married son in Indianapolis, married daughter in Rochester, MN, and daughter attending Miami University (Ohio) as a freshman.

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Earned BS Degree in General Management, Krannert School of Business, Purdue University; MBA Degree in Finance, Xavier University; Honorary Doctorate in Business, Indiana Wesleyan University; Masters Level Strategic Coach; Certification, The Fund Raising School, Center on Philanthropy at Indiana University

*Other nonprofit board involvement*:

- **KIPP Indy College Prep** *(Finance Chair)*
- **Elevate Indy**
- **Goodwill of Central Indiana**
- **Goodwill Education Initiatives**
- **Sagamore Institute**
- **Empart USA** *(Treasurer)*
- **Halftime Indiana** *(City Champion)*
- **Indianapolis Private Industry Council**
- **Dodge National Dealer Council**
- **Young Life** *(Indianapolis Urban Chair)*
- **Indianapolis Urban Enterprise Association** *(Chair)*
- **National Christian Foundation of Indiana** (*Co-Founder & Vice Chair)*
- **Wheeler Mission Ministries**
- **Hoosier Salon** *(Marketing Committee Chair)*
- **Christian Theological Seminary** *(Audit Committee Chair & Advancement Committee)*
- **Second Presbyterian Church** *(Building Committee Chair for $12,000,000 expansion, Budget Committee Chair for $3,000,000 budget, Elder, Strategic Planning Committee, and Teacher)*
- **Wycliffe Bible Translators** *Presidential Advisory Council*

**Don's contact information:**

33 Twinshore Ct.,
Carmel, IN 46033
dpalmer@palmertrucks.com

**317.590.5331**

# DORIS L. PRYOR

9617 Turnberry Court • Carmel, Indiana 46032 • (501) 247-2247 • doris.pryor@hotmail.com

## PROFESSIONAL EXPERIENCE

**U.S. ATTORNEY'S OFFICE** — INDIANAPOLIS, INDIANA

*National Security Chief* — *September 2014 - present*
*Assistant United States Attorney* — *August 2006 – present*
*Acting National Security Unit Chief* — *September 2009 – December 2009*

- Represents the United States in criminal cases at both the United States District Court for the Southern District and the United States Court of Appeals for the Seventh Circuit
- Provides supervisory and administrative leadership to the national security unit
- Conducts extensive criminal investigations and prosecutions that involve local and federal law enforcement agencies
- Prosecutes complex export-control, counter-intelligence, counter-espionage, international terrorism, domestic terrorism, fraud, immigration, drug, firearms and violent crime offenses
- Provides advice and guidance to federal investigative agencies and private industries that aid in thwarting terrorist attacks and protecting national security
- Serves as National Security/Anti-Terrorism Advisory Council Coordinator responsible for helping ensure that federal, state and local agencies are prepared to respond to incidents of terrorism and prevent future terrorist acts.

*Re-entry Coordinator* — *September 2007 – present*

- Collaborated with the district court and our federal probation department to develop and implement a specialized court focused on aiding formerly incarcerated individuals successfully reintegrate into the community reducing recidivism for violent offenders
- Optimized local reentry resources by organizing and chairing a multi-agency and community focused reentry working group securing a quarter-million dollar grant from the United States Department of Justice
- Launches numerous re-entry initiatives, both broad-sweeping programs as well as community-building efforts that strengthen relationships between the community and law enforcement
- Collaborates with local community groups, government agencies, local and federal law enforcement, and area universities to develop policies, institute mentor-based advocacy, and implement best-practices positively reducing the likelihood of recidivism for formerly incarcerated individuals and increasing public safety
- Develops and maintains effective working relationships with neighborhood schools in high-crime area bringing government officials and community leaders into the learning environment to address a broad range of social issues, including domestic violence, youth violence, prevention, community policing, and internet safety

**INDIANA UNIVERSITY MCKINNEY SCHOOL OF LAW** — INDIANAPOLIS, INDIANA

*Adjunct Instructor, Criminal Procedure: Adjudication* — *August 2015 – present*

- Teaches law students the art of competent and principled advocacy
- Trains students to performs legal and factual analysis of criminal statute interpretation, think analytically, and communicate legal principles
- Instructs students to weigh and apply both substantive and procedural law principles
- Applies the procedural rules that accompany the criminal jury trial process

**MILLER COUNTY PUBLIC DEFENDER'S OFFICE** TEXARKANA, ARKANSAS
*Deputy Public Defender* *August 2005 – August 2006*

- Provided legal services for indigent clients in pending criminal matters
- Counseled clients on potential defenses, plea agreements, and acquittals
- Defended clients in jury trial, release hearings and juvenile matters

## JUDICIAL CLERKSHIP EXPERIENCE

HONORABLE J. LEON HOLMES LITTLE ROCK, ARKANSAS
*U.S. District Court for the Eastern District of Arkansas* *August 2004 – August 2005*

HONORABLE LAVENSKI R. SMITH LITTLE ROCK, ARKANSAS
*U.S. Court of Appeals for the Eighth Circuit* *August 2003 – August 2004*

## PROFESSIONAL LICENSES AND AFFILIATIONS

ARKANSAS BAR – *Admitted September 2003*
UNITED STATES EIGHTH CIRCUIT – *Admitted March 2004*
UNITED STATES SEVENTH CIRCUIT – *Admitted August 2006*
INDIANAPOLIS AMERICAN INNS OF COURTS – *Admitted September 2006*
ARKANSAS BAR ASSOCIATION
NATIONAL BLACK PROSECUTORS ASSOCIATION
INDIANAPOLIS BAR ASSOCIATION

## PROFESSIONAL APPOINTMENTS

GOODWILL EDUCATION INITIATIVES INCORPORATED – *Board Member*
INDIANAPOLIS BAR ASSOCIATION DIVERSITY JOB FAIR – *Conference Committee Member*
U.S. ATTORNEY'S OFFICE SOUTHERN DISTRICT OF INDIANA – *Special Emphasis Program Chair*
U.S. SOUTHERN DISTRICT OF INDIANA LOCAL RULES ADVISORY COMMITTEE – *Representative*
MARION COUNTY RE-ENTRY COUNCIL – *Conference Committee Member*
MCKINNEY SCHOOL OF LAW THIRD ANNUAL DIVERSITY DINNER – *Keynote Speaker*
21ST ANNUAL NATIONAL ASSOCIATION OF WOMEN LAW ENFORCEMENT EXECUTIVES – *Panelist*
U.S. MAGISTRATE JUDGE MERIT SELECTION & REAPPOINTMENT PANEL – *Past Representative*
U.S. DEPARTMENT OF JUSTICE EXECUTIVE OFFICE FOR U.S. ATTORNEY'S – *Former Instructor*

## COMMUNITY SERVICE

PILGRIM MISSIONARY BAPTIST CHURCH – *Sunday School Teacher and Mentor*
BIBLE STUDY FELLOWSHIP, INTERNATIONAL – *Group Leader*
NATIONAL BAPTIST CONGRESS OF CHRISTIAN EDUCATION – *Faculty Member, Biblical Studies*

## EDUCATION

INDIANA UNIVERSITY SCHOOL OF LAW BLOOMINGTON, INDIANA
*Doctor of Jurisprudence* *May 2003*

- Editorial Staff, *Federal Communications Law Journal*

UNIVERSITY OF CENTRAL ARKANSAS CONWAY, ARKANSAS
*Bachelor of Arts in Political Science* *May 1999*

CORPUS CHRISTI COLLEGE OF OXFORD UNIVERSITY OXFORD, ENGLAND
*Summer Study Abroad Program* *Summer 1998*

Doris L. Pryor, a graduate of Indiana University Maurer School of Law, serves as the National Security Unit Chief for the United States Attorney's Office for the Southern District of Indiana and is responsible for prosecuting domestic and international terrorism, cyber-threat cases, export violations, white collar fraud, trade secret violations, drug and violent crime that occur within the Southern District of Indiana. Since joining the United States Department of Justice, National Security Chief Pryor has represented the United States of America in criminal cases at both the trial and appellate level, including numerous arguments before the United States Court of Appeals for the Seventh Circuit. While achieving professional success, AUSA Pryor has demonstrated leadership, creativity, and social responsibility while serving as the Reentry and Prevention Coordinator for the U.S. Attorney's Office, participating on the United States Southern District of Indiana Local Rules Advisory Committee, serving as a Barrister with the Indianapolis Chapter of the American Inn of Courts, Chair of the United States Attorney's Office Student Internship Selection Committee, Indianapolis Bar Association Diversity Job Fair committee member, National Black Prosecutors Association, and former member of the United States Magistrate Judge Merit Selection and Reappointment Panel.

Pryor's professional career is enhanced by extensive involvement in the communities were, she has lived and worked, including volunteerism, youth mentorship, and social activism. Currently, Doris serves as an adjunct professor at the Indiana University Robert H. McKinney School of Law. As a deeply committed youth mentor, Doris Pryor is actively engaged in her local church, serves as a liaison with both Daniel Webster Elementary School and Charles Tindley Preparatory Academy, and is a board member with the Goodwill Education Initiatives Board of Indianapolis.

**Attachment 2 – Board Member Information Form**

This attachment contains Board Member Information forms from the following individuals:

- C. Perry Griffith, Jr.
- Betsy Delgado
- Marianne Glick
- Richard Horn
- Jill Kramer
- Kent Kramer
- Rose Mays
- Jay Oliver
- Don Palmer
- Doris Pryor

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve:
   Indianapolis Metropolitan High School; The Excel Centers
2. Your full name:
   C Perry Griffith Jr
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

   I have served on the GEI board since inception. Other boards as well.

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☐ I/we do not know any such trustees ☒ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☒ Not applicable ☐ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ Not applicable ☐ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☒ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☒ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title**<br>C Perry Griffith Jr, Board Member<br>**Signature** | **Date**<br>March 23, 2017 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve: The Excel Center & The Met
2. Your full name: Betsy Delgado
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☑ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
   N/A
5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☑ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☑ I/we do not know any such trustees ☐ Yes
2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☑ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☑ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
   ☑ Not applicable ☑ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☐ Not applicable ☑ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☐ Not applicable ☑ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☑ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☑ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title** Betsy Delgado VP Mission and Education Initiatives<br>**Signature** | **Date** 3/24/17 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve: GOODWILL EDUCATION INITIATIVES

2. Your full name: MARIANNE GLICK

3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
   BALL STATE UNIVERSITY TRUSTEE FOR 11 YEARS

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☒ I/we do not know any such trustees ☐ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☐ Not applicable ☒ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☐ Not applicable ☒ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☐ Not applicable ☒ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☐ Does not apply to me, my spouse or family ☒ Yes As a board member of UWCI, & The Glick Foundation we sometimes provide grants to Goodwill and Indy Met.

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☒ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title** MARIANNE GLICK GEI BOARD MEMBER<br>**Signature** Marianne Glick | **Date** 3/23/17 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

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The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve: Indiana Metropolitan High School
2. Your full name: RICHARD WAYNE HORN
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
   1) GEI
   2) CARMEL DAD'S CLUB DIRECTOR
   3) Part owner of $400M real estate invest. comp.
5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☐ I/we do not know any such trustees ☒ Yes
2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☐ Not applicable ☒ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☐ Not applicable ☒ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☒ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☒ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title** RICHARD W. HORN, PRESIDENT STRATEGIC CAPITAL PARTNERS<br>**Signature** | **Date** 3/23/17 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

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### Background

1. Name of charter school on whose board of directors you intend to serve:
   Goodwill Education
2. Your full name:
   Jill Robinson Kramer
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of Attachment 1).
   ☒ Resume is attached. Please do not include a resume in both Attachment #1 and #2.

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

   I do not have previous board experience. However, I've spent nearly two decades wo

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☒ I/we do not know any such trustees ☐ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☐ Not applicable ☒ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☐ Not applicable ☒ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☐ Does not apply to me, my spouse or family ☒ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☐ None ☒ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| Name and Title<br>Jill Robinson Kramer<br>Signature<br>Jill Kramer | Date<br>3/9/2017 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve:
   THE EXCEL CENTER – CLARKSVILLE
2. Your full name: KENT A. KRAMER
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☑ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
   I DO NOT SERVE ON ANY CHARTER SCHOOL BOARDS. EX OFFICIO – NON VOTING GOODWILL EDUCATION INITIATIVES (GEI)
5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☑ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☐ I/we do not know any such trustees ☑ Yes AS CEO OF GOODWILL I KNOW ALL BOARD MEMBERS OF GEI.
2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☑ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☑ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☑ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☑ Not applicable ☐ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☑ Not applicable ☐ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☐ Does not apply to me, my spouse or family ☑ Yes
   I AM AN OFFICER OF GOODWILL OF CENTRAL AND SOUTHERN INDIANA — PARENT ENTITY OF GEI

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☑ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title** KENT A. KRAMER PRESIDENT & CEO<br>**Signature** Kenta Kramer | **Date** 3.24.17 |

Exhibit C

## Charter School Board Member Information Form

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

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**Background**

1. Name of charter school on whose board of directors you intend to serve:
   Goodwill Education Initiatives - Excel Centers
2. Your full name:
   Rose M. Mays
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

   10 years as board member of Avondale Meadows Academy

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☒ I/we do not know any such trustees ☐ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☒ Not applicable ☐ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ Not applicable ☐ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☒ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☒ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title**<br>Rose M. Mays, Professor Emeritus<br>**Signature**<br>Rose M. Mays | **Date**<br>March 9, 2017 |

Exhibit C

## Charter School Board Member Information Form

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

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The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

### Background

1. Name of charter school on whose board of directors you intend to serve:
   Goodwill Education
2. Your full name:
   Jill Robinson Kramer
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of Attachment 1).
   ☒ Resume is attached. Please do not include a resume in both Attachment #1 and #2.

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

   I do not have previous board experience. However, I've spent nearly two decades wo

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☒ I/we do not know any such trustees ☐ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☐ Not applicable ☒ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☐ Not applicable ☒ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☐ Does not apply to me, my spouse or family ☒ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☐ None ☒ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| Name and Title<br>Jill Robinson Kramer<br>Signature | Date<br>3/9/2017 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

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The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve: GEI - EXCEL & METROPOLITAN HIGH SCHOOL
2. Your full name: DONALD L. PALMER
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member: KIPP INDY, GOODWILL CENTRAL INDIANA, DAGAMORE INSTITUTE, ELEVATE INDY, - NUMEROUS ENTREPRENEURIAL VENTURES TEACH ENTREPRENEURSHIP @ BUTLER
5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☐ I/we do not know any such trustees ☒ Yes CURRENTLY SERVING
2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
☐ Not applicable ☒ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
☐ Not applicable ☒ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
☐ Not applicable ☒ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
☒ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
☒ None ☐ Yes

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

| **Name and Title** | **Date** |
|---|---|
| **Signature** Donnesh Palmer | 3-15-17 |

Exhibit C

## Charter School Board Member Information Form

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

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve:
   GEI
2. Your full name:
   Doris L. Pryor
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).
   ☒ Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**

4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

   I have served on the GEI Board for approximately 4 years.

5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?
   ☒ Yes ☐ Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
   ☐ I/we do not know any such trustees ☒ Yes

2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

☒ I/we do not know any such persons. ☐ Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ I/we do not anticipate conducting any such business ☐ Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship
   ☒ Not applicable ☐ I/we do not know any such persons ☐ Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
   ☒ Not applicable ☐ I/we have no such interest ☐ Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
   ☒ Not applicable ☐ I/we or my family do not anticipate conducting any such business ☐ Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
   ☒ Does not apply to me, my spouse or family ☐ Yes

8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
   ☒ None ☐ Yes

| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. | |
|---|---|
| **Name and Title**<br>Doris Pryor, National Security Chief, USAO-SDIN<br>**Signature**<br>Doris Pryor | **Date**<br>3/14/2017 |

**Attachment 3 – Education Service Provider**

Not applicable. GEI does not intend to contract with an Education Service Provider.

**Attachment 4 – Governance and Operational Structure**

The table below defines school, network, and governing board level decision-making authority as it relates to key functions of The Excel Centers within GEI's network.

Please note that the following table has been adapted from the Indiana Charter School Board's Exhibit D to its Experienced Operators Full Application Packet. The Excel Center will not contract with an Education Service Provider; however, because GEI acts as the schools' central office and provides significant support to all of The Excel Centers it operates, network-level responsibilities are depicted, below.

X = primary responsibility
/ = secondary responsibility

| Function | Governing Board | Network | School | Notes |
|---|---|---|---|---|
| Performance Goals | / | X | / | School performance goals are set at the network level, based on charter goals, network goals, and school accountability measures. The governing board approves all school performance goals. Each school is responsible for meeting performance goals and also setting their own internal goals to ensure overall goals are being met. |
| Curriculum | | X | / | Curriculum is developed at the network level (and selected, where appropriate). Schools are responsible for implementing curriculum and teachers are afforded the autonomy to enhance and develop supplemental materials that assist with curriculum delivery. |
| Professional Development | | X | / | Professional development is the primary responsibility of the network, ensuring consistency and success across all schools. Based on individual school and staff performance, specialized or individualized professional development may be requested or needed at the individual school level. |
| Data Management and Interim Student Assessments | | / | X | At the school level, staff manage data as part of the school's plan to improve educational practice. Day-to-day data management is achieved at each school site and data entry is the |

| | | | | |
|---|---|---|---|---|
| | | | | responsibility of all staff members. The SIS is supported at the network-level and the quality of data entered into the SIS is monitored and ensured by central office staff. |
| Grade Level Promotion Criteria | | X | | Grade level promotion criteria are developed at the network level and implemented at the school level. |
| Culture | | / | X | It is the responsibility of each school to implement the culture of The Excel Center. GEI provides support, guidance, and best practices to ensure that the culture of each school is consistent with the mission of The Excel Center and optimizes the learning environment for adults. |
| Budgeting, Finance, and Accounting | / | X | / | Budget, finance, and accounting is the primary responsibility of GEI. Budget development is an iterative process that incorporates input from key stakeholders. The annual budget will be developed each year by GEI's Director of Financial Operations, with the support of senior leadership. Each School Director is involved in the process of budget development for their school. Budgets are presented to the Board for review, modified as necessary, and adopted. |
| Student Recruitment | | / | X | Student recruitment is the responsibility of each school. Support, guidance, best practices, and student recruitment materials are provided to schools from the network. |
| School Staff Recruitment and Hiring | | X | X | Staff recruitment and screening is handled at the network level, but school staff hiring decisions are made at the school-level. In instances where support is needed, GEI is able to provide input and guidance to the School Director in making hiring decisions. |
| HR Services (payroll, benefits, etc.) | | X | | All HR services are handled at the network level in order to create operational efficiencies and free up school staff's time and resources to |

| | | | | |
|---|---|---|---|---|
| | | | | focus on student performance and success. |
| Development | | X | | Development efforts, when necessary, are managed at the network level in order free up school staff's time and resources to focus on student performance and success. |
| Community Relations | / | / | X | It is the responsibility of each school to ensure positive and productive relationships within the community it is located. Each location of The Excel Center will have an advisory group or participate in community-wide advisory groups or committees to ensure that The Excel Center is providing a relevant educational program that meets the local community's need. GEI and the Board will support each school in developing positive community relationships and will take on the primary responsibility of developing state-wide relationship and articulating the mission and vision of the schools to a broader audience and stakeholders. |
| Information Technology | | X | | GEI employs an information technology department that provides technology support to all of its schools. When necessary, the IT department may enlist the support of GCSI's IT department. |
| Facilities Management | | X | | Facilities management is handled at the network level in order free up school's staff time and resources to focus on student performance and success and to build upon GCSI's experience in this domain. |
| Vendor Management/Procurement | | X | | Vendor management and procurement is handled at the network level in order to create operational efficiencies and free up school staff's time and resources to focus on student performance and success and to build upon GCSI's experience in this domain. |
| Data Analysis | | X | X | Each school site conducts data reviews on a weekly basis and GEI |

| | | | | |
|---|---|---|---|---|
| | | | | conducts reviews of school performance at least every 8 weeks. As necessary, GEI's Director of Data Services is able to provided further, in-depth data analysis on an ad-hoc basis. |
| Data Reporting | | X | | Central office staff are responsible for submitting all state reports to the IDOE and authorizer-specific reports to authorizers. |

**Attachment 5 – Network Business Plan**

**Strategic Vision & Impact**

In 2004, Goodwill Industries of Central and Southern Indiana, Inc. (GCSI) leadership created Goodwill Education Initiatives, Inc., (GEI) a not-for-profit entity formed in 2003 to operate charter schools. That year, the Mayor of Indianapolis authorized a charter for the Indianapolis Metropolitan High School which opened in fall 2004. In 2010, GEI opened The Excel Center, a high school designed to for adults who previously dropped out of high school and were seeking to reengage in their education to earn a high school diploma and begin postsecondary education to develop career paths that offer greater employment and career growth opportunities.

Today, the vision of GEI, through The Excel Center, is to deliver on the mission of GCSI: to change lives by empowering people to increase their independence and reach their potential through education, health, and employment. The Excel Centers desire to bring about hope and economic opportunity to communities, families, and individuals. Through the power of education, its goal is to set people on a pathway towards better career prospects that lead to economic self-sufficiency and breaking the cycle of poverty.

To that end, in its short history, The Excel Center has achieved strong results in helping adults gain a high school diploma and enter into postsecondary education and high-growth, in-demand jobs. To date, The Excel Centers operated by GEI have seen the following results:

- 2,385 graduates,
- Nearly 90% of graduates have graduated with either college credits or an industry certification,
- 44% of graduates have enrolled in college upon graduation and nearly 80% are still enrolled 1 year post-graduation,
- 88% of graduates are employed 6 months post-graduation, and
- An independent economic impact study by Dr. Michael Hicks from Ball State University has estimated that the increased rate of employment of individuals graduating from The Excel Center is yielding an average of $4.3 million per year in state economic impact.

Despite these positive results, there remain large numbers of individuals who lack a high school diploma, making them unprepared to build the skills needed to be competitive in the workforce and, in many cases, secure jobs that offer a livable wage and continued career growth. There are nearly 700,000 Hoosiers who lack a high school diploma. Currently, The Excel Centers can serve 3,500 of these individuals at any point in time. There are hundreds of thousands of Hoosiers who live too far away from the Excel Center's current locations to enroll in the school. As a result, the school has not begun to reach all of the existing demand in Indiana for adults to earn a high school diploma. Through this charter application GEI intends to in order to reach that demand.

In addition to meeting its goals to enable individuals to earn a high school diploma and begin postsecondary education while developing career paths that offer greater employment and career growth opportunities, The Excel Center can create several other lasting benefits in a local community. The Excel Center may serve as a feeder system for skills training programs that improve work readiness for individuals in particular geographic regions. By increasing the skill level of the local community, The Excel Center can increase the number of skilled workers in high-growth fields, making that area more attractive to potential business investment.

**Five-Year Growth Plan**

GEI plans to reach more adults and increase educational attainment in cities across GCSI's territory by opening four new Excel Center over the next five years. By adding more schools across central and

southern Indiana, GEI will positively impact more communities and countless families and individuals. Many students within existing Excel Centers have been willing to drive long distances to attend school, but this option is only limited to students who have the financial resources and time to travel to existing locations. By adding new locations in other cities, The Excel Center will allow hundreds more adults to have stable, convenient access to an educational model designed around the situation and unique needs of adults who have dropped out of school.

The table, below) provides the five-year growth plan for The Excel Centers operated by GEI.

| | **2018-19** | **20019-20** | **2020-21** | **2021-22** | **2022-23** |
|---|---|---|---|---|---|
| **School Location (year of opening)** | Muncie | Marion | Columbus | Bloomington | -- |
| **Total Number of New Schools** | 1 | 2 | 3 | 4 | 4 |
| **Total Enrollment Capacity of New Schools** | 300 | 600 | 900 | 1,200 | 1,200 |
| **TOTAL NUMBER OF GEI-OPERATED EXCEL CENTERS** | 13 | 14 | 15 | 16 | 16 |

It should be noted that on an annual basis, GEI will reassess and adjust its growth plans based on community demand and interest throughout GCSI's territory in central and southern Indiana. For this reason, although GEI is requesting to open four charter schools in four successive years, GEI is formally requesting the ability to open four schools within a five-year timeframe to adjust for community outreach efforts as well as any unforeseen capacity constraints, including but not limited to identifying school facilities.

**Criteria for Selecting New Locations**

In order to assess the feasibility of opening The Excel Center in new communities, it is necessary to determine whether evidence suggests there is a significant and sustainable level of need in communities (i.e., Are there a significant number of individuals without a high school diploma? Do area education trends suggest that the emerging workforce will continue to increase the number of individuals without a high school diploma, in the absence of an adult high school option?) In addition to the sheer number of individuals who may benefit from The Excel Center, it is equally important to determine how the workforce fares in the current state of the economy (i.e., Does the state of the current workforce indicate that individuals will benefit from earning a high school diploma?).

The table, below, depicts the number of adults without a high school diploma in each of GEI's targeted communities, in addition to the typical annual number of dropouts from area schools, the local poverty rate[1], and earnings gap[2].

| **City** | **Total Adults without a High School Diploma** | **Adults Ages 18-34 without a High School Diploma** | **Annual Number of Dropouts** | **Poverty Rate** | **Earnings Gap** |
|---|---|---|---|---|---|
| Muncie | 6,743 | 2,264 | 208 | 32% | $8,620 |
| Marion | 3, 831 | 1,034 | 69 | 31% | $8,378 |
| Columbus | 2,988 | 913 | 151 | 29% | $7,778 |
| Bloomington | 3,225 | 1,242 | 146 | 40% | $4,842 |

[1] The Poverty Rate is the percentage of adults without a high school diploma living in poverty.

[2] The Earnings Gap is the difference in wages between adults without a high school diploma and adults with a high school diploma.

**Organizational Capacity**
GEI, with the support of GCSI, has significant resources that can be used to replicate The Excel Center. GEI has rapidly grown The Excel Center in an effort to meet the demand of adults who desire to continue their education. The Excel Center has grown from one location with 300 students in 2010 to eleven with nearly 3,500 students in 2016. During that time, The Excel Center's staff has grown from 20 to approximately 250 fulltime staff GEI's central office staff has grown to over 40 individuals. This growth is in large part due to GEI and GCSI's collection of skills, experience, and talents. As a result, The Excel Center's growth plans are supported by capable leaders, managers, and individuals who are committed to The Excel Center as a part of both GEI's mission.

The support of Goodwill has been a critical component of The Excel Center's rapid growth. GCSI's support infrastructure provides quality support that allows educational leadership to devote their time and energy to the formation of new schools and to shaping its culture. GCSI has developed strong capabilities in taking initiatives to scale across its geographic area, and Goodwill's organizational culture emphasizes its staff's ability to mobilize quickly to take advantage of opportunities. The best evidence of this capacity is in the growth of Goodwill's retail stores. Since 2004, Goodwill has added or relocated more than forty Goodwill stores, including nine new stores in 2014. The experience Goodwill has gained opening dozens of new stores – recruiting new staff, promoting the store in the local community, securing a building and making renovations – has enabled its marketing, finance, and facilities teams to develop competencies which have proven transferrable to opening and starting up new schools. GCSI's leadership team remains instrumental in the planning, execution, and design of opening new GEI-operated schools. Additionally, as GEI's support infrastructure increases, GEI continues to learn from GCSI's retail operations about how to achieve results while managing operations across a wide geographic network.

These experiences have already informed how GEI has grown The Excel Center since its first year. Each time GEI opens a new school, it mobilizes GCSI's human resources, marketing, and facilities management staff to prepare for school openings. More importantly, GEI and GCSI use one of their key principles – continuous improvement – as a guide for how each location should open. GEI leaders are constantly looking for ways to improve processes and gain efficiencies in opening schools. With each new Excel Center location GEI has opened, the challenge and difficulty is reduced. Processes have been refined based on lessons learned in prior implementations, and a significant amount of support was provided to each new Excel Center.

Opening each new Excel Center requires significant planning and execution to ensure that the startup plans for the school are effectively run within required timelines. Leadership selection and development will continue to be a critical component of The Excel Center's growth plans. The Excel Center's success in new locations will be driven by the ability to attract or promote high quality school leaders. Each new Excel Center site must have an effective local director who can manage the staff and team of the school in that location. In addition to adding more staff to support the growing number of schools it operates, GEI is also investing in its infrastructure to align staff effectively. As the number of schools GEI manages grows, efficient and effective management will depend upon the systems and processes in place to review and assess program performance.

*Central Office Support.* A strong central office is a critical component of the success of the existing Excel Centers and is equally critical to the success of any new Excel Center. Since GEI opened its first school in 2004, it has grown to include expertise in the following areas: accounting and bookkeeping; payroll; curriculum and curriculum development; data analytics; data collection and state reporting;

development; and registrar. In addition to providing administrative services, GEI's central office staff is actively involved in state and local policy-making decisions, ensuring that the needs of The Excel Center are being heard by state and local officials. GEI's central office staff provides high-level support in all school support functions, allowing school staff the time and flexibility to focus on their key objective: student success.

*Financial Management.* GEI follows Generally Accepted Accounting Principles (GAAP) and State Board of Account requirements in all accounting practices for its schools. Day-to-day financial management is provided by GEI's Director of Financial Operations, who also acts as the assistant treasurer for GEI's Board of Directors. The Director of Financial Operations will be assisted and supported by the Chief Financial Officer of GCSI, who is also the Board treasurer of GEI. Payroll is managed by GEI staff for all of its employees. Excel Centers, LLC and Indianapolis Metropolitan High School, LLC are audited on an annual basis, and consolidated GEI financial operations are included with GCSI's annual audit process. GEI contracts with Greenwalt CPAs as its independent auditor to conduct the annual audits of all of its schools. To support The Excel Center's growth, GEI's finance department will add up to 1.5 additional fulltime employees in the next one to two years.
GEI 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 (GEI maintains bank accounts in federally insured, non-speculative, commercial bank or credit union accounts).

*IT Systems.* As the number of schools increases, the performance and operation of GEI's schools will depend upon effective IT systems that organize and communicate key information and present GEI and school-level management with performance data of each school. GEI has invested in a learning management system and a data warehouse to assist network leaders and site directors to understand the school's academic and financial positions quickly and to share curriculum, operational, student resources across each school.

A critical component of managing performance at scale is having access to relevant data in order to help leaders make informed decisions about how to improve processes and outcomes. GEI has heavily invested in its ability to gain value from its schools' data in order to equip GEI administration to monitor performance across all of its locations and to empower its leaders and staff to use data to make decisions to improve school operations, instructional quality and – ultimately – student outcomes.

*Making Data Readily Available.* The Excel Center can be classified as a dropout recovery school, and The Excel Center anticipates that it will be evaluated based upon (1) the number of students it graduates within a given year divided by the average ADM count for that year; (2) the school's non-waiver graduation rate; and (3) the percentage of its graduates that are "college and career ready" when they graduate (earning an industry certification or dual credit). GEI has developed a data warehouse that enables leaders to understand the accountability score as an interim measure – in other words, the warehouse will display at a moment-in-time what its projected accountability grade will be. It also provides real-time data regarding school performance on key metrics that school staff and leadership have identified as proxy measures of school success. By giving leaders this information, the data warehouse will also enable leaders to understand what activities may serve as levers to improve overall school performance. The data warehouse uses a user frontend that allows end users to understand their data and use it to make decisions. GEI's warehouse implements Tableau Software to create a system to

navigate the data generated in each system. By applying filters, creating dashboards, and other drill-down information, the data warehouse has helped to ask questions, make analysis, and share school and student results with peers and partners.

*Learning Management System.* GEI has also purchased a Learning Management System to facilitate communications and information sharing between teachers, staff, and students in The Excel Center. This system creates a coordinated platform through which teachers can organize courses and gather curriculum resources. The Learning Management System is currently in use across all of The Excel Center locations, serving as the online portal through which important documents, curriculum resources, and processes are shared. Class dates, course syllabi, assignments, and assessments are all organized within the system. Additionally, some classes' core content can be delivered almost exclusively through self-paced material

**Anticipated Risks**

As with any new venture, GEI anticipates some challenges associated with starting a new school. These challenges include: (1) attracting and recruiting the best talent to staff the schools, (2) maintaining a student-focused and mission-driven culture in each new Excel Center, and (3) maintaining adequate funding levels for The Excel Center.

In order to mitigate risks and overcome challenges associated with attracting and recruiting the best talent to staff the schools, The Excel Centers have adopted a robust staff recruitment and selection strategy which is further detailed in the "Human Capital" portion of Section III (Implementation Plan) of this application.

To maintain a student-focused and mission-driven culture, as a part of new staff development, staff will learn more about the population they will be serving in The Excel center. In a group setting, staff will watch videos of students' communication styles, and examine case studies of student barriers. Staff will debrief these experiences, brainstorm ways of working with this student population, and set expectations for their work in the school in the future. Administrators from GEI and the other Excel Center sites will also assist new staff in learning how to work with this population and to share ideas and best practices on means of promoting student engagement and success. Staff also meet on a weekly basis to review data and determine how to meet the needs of each student, ensuring that staff are constantly focused on the success of each student.

Since funding for The Excel Centers was pulled out of Indiana's K-12 education budget, GEI staff spend a significant amount of time on community outreach and engagement and have also keenly focused on collecting data to demonstrate the success of the school. GEI staff have been proactively engaging with community members and state legislators to articulate the mission, vision, and success of The Excel Centers and to justify funding for the schools during each biannual legislative budget session. GEI has hired a lobbying firm and key members of senior staff have become registered lobbyists in order to support the financial sustainability of the schools. Furthermore, GEI commissioned an economic impact study on The Excel Center in 2013 to identify the school's overall impact on Indiana's economy and is the process of commissioning another study. GEI intends to use these results to continue to demonstrate The Excel Center's impact on communities and the state as well as for continuous improvement efforts in identifying ways to better serve The Excel Center's student population and the communities where they are located.

**Attachment 6 – Course Scope and Sequence**

| **English** | **English 1**<br>System 44<br>90 minutes | **English 1 Writing Lab (Writing Lab 1)**<br>90 minutes | **English 2**<br>READ 180<br>90 minutes | **English 2 Writing Lab (Writing Lab 2)**<br>90 minutes | **English 3**<br>World Studies A<br>180 minutes<br>Acuity A | **English 4**<br>World Studies B<br>90 minutes<br>Acuity B | **English 5**<br>American Studies A<br>180 minutes<br>Acuity C<br>**ECA Test** | **English 6**<br>American Studies B<br>180 minutes | **English 7 OR English 111 (dual credit)** |
|---|---|---|---|---|---|---|---|---|---|
| **Pre-requisites** | SRI< 600L with SPI Cut Score | Concurrent enrollment with English 1 | SRI 600-1000L Concurrent enrollment with Writing Lab 2 | Concurrent enrollment with English 2 | SRI 1000+ Concurrent enrollment with Writing Lab 3 | World Studies A | World Studies B | American Studies A | ACCUPLACER WritePlacer 4-8 and Reading Diagnostic 69-120 |
| **Credits Awarded** | 0500 BAS SKLS: ENG 1<br>*2 General Elective credits/term* | 0500 BAS SKLS: WRITE 1<br>*2 General Elective credits/term* | 0500 BAS SKLS: ENG 2<br>*2 General Elective credits/term*<br>-OR-<br>The final term of READ 180 before moving into ENGLISH 3 (i.e. course completion, 1000L), the following credits are awarded:<br><br>1120 DEV READING<br>*1 General Elective credit*<br>1046 SHORT STRS<br>*1 English credit* | 0500 BAS SKLS: WRITE 2<br>2 *General Elective credits/term*<br>-OR-<br>The final term of READ 180 before moving into ENGLISH 3 (i.e. course completion, 1000L), the following credits are awarded:<br><br>1010 LANG LAB<br>*1 General Elective credit*<br>1062 GRAMMAR<br>*1 English credit* | 1026 CLASS LIT<br>1090 COMP<br>*2 English credits*<br><br>1010 LANG LAB<br>*1 General Elective credit*<br><br>1548 WLD HST/CVL A*<br>*1 World History credit* | 1094 EXPOS WRIT<br>*1 English credit*<br>1052 WORLD LIT<br>*1 English credit*<br>1548 WLD HST/CVL B*<br>*1 World History credit* | 1020 AMER LIT A & B<br>*2 English credits*<br>1542 US HIST A*<br>*1 US History credit*<br>1540 US GOVT<br>*1 Government credit* | 1008 ENG 12 A & B<br>*2 English credits*<br>1542 US HIST B*<br>*1 US History credit*<br>4528 DIG APPS RESP<br>*1 Directed Elec credit* | 1124 ADV ENG CC<br>*2 English credits*<br><br>OR<br><br>Non Dual Credit Option:<br><br>1098 ADV COMP<br>*1 English credit*<br>1082 LBRY MEDIA<br>*1 English credit* |

| **Math** | **Math A**<br>90 minutes | **Math B**<br>90 minutes | **Algebra I A**<br>180 minutes | **Algebra I B**<br>180 minutes<br>**ECA Test** | **Financial Foundations**<br>90 minutes | **Geometry**<br>180 minutes | **Algebra II**<br>180 minutes | **MATH 136** |
|---|---|---|---|---|---|---|---|---|
| **Pre-requisites** | Placement Test A < 70% (14/20) | Placement Test A > 70% (14/20) and Placement Test B < 70% (14/20) | Placement Test B > 70% | Algebra I A | Concurrent enrollment in Algebra I<br>or Algebra I and SRI 1000+L | Algebra I B | Geometry | ACCUPLACER Elementary Algebra 92-120 or Strands 9, 10, & 11 ≥ 9 |

**Attachment 6 – Course Scope and Sequence**

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Credits Awarded** | 0500 BAS SKLS: MATH A<br>*2 General Elective credits/term* | 0500 BAS SKLS: MATH B<br>*2 General Elective credits/term* | 2520 ALG I A<br>*1 Math credit*<br>2516 ALG I LAB<br>*1 General Elective credit (for General Diploma = 1 Math credit)* | 2520 ALG I B<br>*1 Math credit*<br>2516 ALG I LAB<br>*1 General Elective credit (for General Diploma = 1 Math credit)* | 1514 ECON<br>*1 Economics credit*<br>4512 BUS MATH<br>*2 Directed Elective credits (for General Diploma= 2 math credits)*<br>4540 PRS FIN RSP<br>*1 1 Directed Elective credit* | 2532 GEOM A & B<br>*2 Math credits* | 2522 ALG II A & B<br>*2 Math credits* | 2544 ADV MTH CC<br>*2 Math credits* |

**Attachment 6 – Course Scope and Sequence**

| **Science** | **Integrated Chemistry/Physics**<br>90 minutes | ****Biology and**<br>180 minutes<br>**ECA Test** | **Science Research**<br>90 minutes<br><br>(May be offered as a stand-alone course or integrated with any other science course) | **BIOL 101** |
|---|---|---|---|---|
| **Pre-requisites** | Recommend Concurrent with Math Lab B or Algebra I A | | SRI 900+ L | ACCUPLACER<br>80 in Sentence Skills<br>76 in Reading<br>40 in Elem Alg or 60 in Arith |
| **Credits Awarded** | 3108 ICP A & B<br>*2 Science credits*<br>(Meets Physical Science requirement) | 3024 BIO I A & B<br>*2 Science credits*<br>(Meets Life Science requirement) | 3008 SCI RSRCH IS<br>*2 Science credits* | 3026 BIO II<br>2 Science credits |

**Due to the Biology ECA requirement, Biology must be taken in Terms 1-4 and should never be scheduled during Term 5.

| **Other** | **Skills for Success**<br>90 minutes | **Peer Tutor**<br>Time varies | **Computer Basics**<br>90 minutes | **Film Literature**<br>90 minutes | **Contemporary Literature**<br>90 minutes | **Speech**<br>90 minutes | **Current Problems, Issues & Events** | **Psychology (non-dual credit)** | **Health & Wellness**<br>Online plus CPR Classroom Instruction | **Physical Education I & II**<br>Online plus Personal Fitness Logs | **Senior Seminar** | **College Entrance Prep**<br>(Accuplacer Prep) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Pre-requisites** | | | | SRI 1000+ L | SRI 1000+ L | SRI 1000+ | SRI 100+ | | SRI 600+ L | SRI 400+ L | Two terms before graduation | May be combined with Senior Seminar Or IVY 101 |

**Attachment 6 – Course Scope and Sequence**

| **Credits Awarded** | 0500 BAS SKLS: STUDY 1 *General Elective credit* 0522 CARR INFO 1 *General Elective credit* | 0520 PEER TUTR *1 General Elective Credit/Term (max of 2)* | 4528 DIG APPS RESP *1 Directed Elec credit* 0500 BAS SKLS: COMPUTER 1 *General Elective credit* | 1034 FILM LIT *1 English credit* 1092 CREAT WRIT *1 English credit* | 1054 CONTEM LIT *1 English credit* | 1076 SPEECH *2 English credits* | 1512 CPIE *1 General Elective credit* | 1532 PSYCH *2 General Elective credits* | 3506 HLTH&WELL *1 Health credit* | 3542 PHYS ED *1 PE credit* 3544 PHYS ED II *1 PE credit* | 5394 PREP CC *1 Directed Elective credit* 0522 CARR INFO *1 General Elective credit* | 0532 COL-ENT PREP *1 General Elective credit* |
|---|---|---|---|---|---|---|---|---|---|---|---|---|

**Attachment 6 – Course Scope and Sequence**

**Industry Certifications and Career Pathway Dual Credits**

An Excel Center graduation requirement includes at least one career pathway or dual credit course.
This requirement may have been met in a previous school.

| **Program** | **Forklift** | **CDL** | **Logistics** | **HIRE Tech IA Term 1** | **HIRE Tech IB Term 2** | **CPT Part 1** | **CPT Part 2** | **Welding** | **Associated Builders & Contractors Core Curriculum** | **CNC Machine Operator Training** |
|---|---|---|---|---|---|---|---|---|---|---|
| **Certification Exam** | OSHA Forklift Certification | CDL | MSSC: Certified Logistics Associate | Dual credit final exams | MSSC: Certified Logistics Associate<br>APICS: Logistics<br>APICS: Operations<br>MSSC: Safety | MSSC: Safety<br>MSSC: Quality Practices and Measurement | MSSC: Manufacturing Processes and Production<br>MSSC: Maintenance Awareness | AWS | | NIMS CNC Operator Level 1 |
| **Credits Awarded** | 5602 WOMH<br>*3 Directed Elec credits* | 5622 TRACT OPER<br>*6 Directed Elec credits* | *6 Directed Elective Credits:*<br><br>5601 SCM LGST<br>*3 Directed Elec credits*<br>5602 WOMH<br>*3 Directed Elec credits* | *2 Directed Elective Credits:*<br><br>4796 INT ADV MFTG<br>*1 Directed Elec credit*<br>5238 ADV CTE CC<br>*1 Directed Elec credit* | *4 Directed Elective Credits:*<br><br>4796 INT ADV MFTG<br>*1 Directed Elec credit*<br>5608 ADV MFTG I<br>*2 Directed Elec credits*<br>5238 ADV CTE CC<br>*1 Directed Elec credit (from HIRE 1A)* | 5608 ADV MFTG I<br>*3 Directed Elec credits* | 5608 ADV MFTG I<br>*3 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5776 WELD TECH I<br>*6 Directed Elec credits*<br>5778 WELD TECH II<br>*2 Directed Elec credits* | *6 Directed Elective Credits:*<br><br>5580 CONST TECH I<br>*3 Directed Elec credits*<br>5578 CONST TECH II<br>*3 Directed Elec credits* | *6 Directed Elective Credits:*<br><br>5782 PCSN MACH I<br>*3 Directed Elec credits*<br>5784 PCSN MACH II<br>*3 Directed Elec credits* |
| **Dual Credits Awarded** | | | | MPRO 100, 106 | | | | | | |

**Attachment 6 – Course Scope and Sequence**

| **Program** | **CADD Technician/AutoCAD Part 1** (8 weeks) | **CADD Technician/AutoCAD Part 2** (8 weeks) | **Pharmacy Technician** | **Dental Assisting** | **Medical Coding** | **Patient Access** | **Emergency Medical Technician** | **Certified Medical Assistant** | **Certified Nursing Assistant** | **Phlebotomy** |
|---|---|---|---|---|---|---|---|---|---|---|
| **Certification Exam** | | AutoCAD Certified User | PHTE | | 429 (medical coding certificate) | | EMT | 451 | CNA | phleb |
| **Credits Awarded** | *6 Directed Elective credits:*<br><br>4800 COMP DES<br>*2 Directed Elec credits*<br>4802 INT ENG DES<br>*2 Directed Elc credits*<br>5608 ADV MFTG I<br>*2 Directed Elec credits* | *6 Directed Elective credits:*<br><br>5606 ADV MFTG II<br>*6 Directed Elec credits* | *8 Directed Elective credits:*<br><br>5282 HLTH ED I: PHARM<br>*6 Directed Elec credits*<br>5214 HSE II PHARM<br>*2 Directed Elec credits* | *8 Directed Elective Credits*<br><br>*5247 MED TERMS*<br>*2 Directed Elec credits*<br><br>*5282 HEALTH ED I: DENT*<br>*6 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5274 MED TERMS: COD<br>*2 Directed Elec credits*<br>5282 HLTH ED I: COD<br>*6 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5274 MED TERMS: ACC<br>*2 Directed Elec credits*<br>5282 HLTH ED I: ACC<br>*6 Directed Elec credits* | *6 Directed Elective Credits:*<br><br>5282 HLTH ED I: EMT<br>*3 Directed Elec credits*<br>5210 EMS<br>*3 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5282 HLTH ED I: CMA<br>*3 Directed Elec credits*<br>5284 HSE II NURS<br>*3 Directed Elec credits*<br>5286 HSE II ST (Practicum)<br>*2 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5282 HLTH ED 1: CNA<br>*3 Directed Elec credits*<br>5284 HSE II NURS<br>*3 Directed Elec credits*<br>5286 HSE II ST (Practicum)<br>*2 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5282 HLTH ED I: PHLE<br>*3 Directed Elec credits*<br>5286 HSE II ST<br>*2 Directed Elec credits*<br>5207 WBL HS<br>*3 Directed Elec credits* |

**Attachment 6 – Course Scope and Sequence**

| **Program** | **Microsoft Office Specialist** | **Microsoft Technology Associate** | **CompTIA A+** | **Early Childhood Education** 90 min | **CDA A and CDA A CC** | **CDA B and CDA B CC** | **CDA I** | **Customer Service/Technical Support Representatives** | **Certified Business Professional** | **Apartment Maintenance Technology I** | **Apartment Maintenance Technology II** | **Aviation Assembly Mechanic** | **Hospitality Management** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Certification Exam** | MOS | MTA Software Development Fundamentals & Software Testing Fundamentals | aplus | ECE Pre-Pac | | | | TSIA CSP-1 | CBP Exam | | | | Certified Guest Professional (CGSP) Certified Front Desk Professional |
| **Credits Awarded** | *3 Directed Elective Credits:*<br><br>4530 DIGI CITI<br>*1 Directed Elec credit*<br>4528 DIG APPS RESP<br>*2 Directed Elec credits* | *4 Directed Elective Credits:*<br><br>4803 INTO CS<br>*2 Directed Elec credits*<br>4801 COM SCI I<br>*2 Directed Elec credits* | *8 Directed Elective Credits:*<br><br>5230 COMP TECH<br>*4 Directed Elec credits*<br>5234 NTWRK FUND<br>*4 Directed Elec credits* | *5 Directed Elective Credits:*<br><br>5362 CHLD DEV<br>*1 Directed Elec credit*<br>5360 ADVCHLD DEV<br>*1 Directed Elec credit*<br>5412 ECE I<br>*3 Directed Elec credits* | *4 Directed Elective Credits:*<br><br>*1 5362 Child Dev credit*<br><br>*3 5412 ECE I*<br><br>**CC Students get ECED 103* | *5 Directed Elective Credits:*<br><br>*2 5360 ADVCHILD DEV*<br><br>*3 5412 ECE I*<br><br>**CC Students get ECED 101* | *4 Directed Elective Credits:*<br><br>*2 5406 ECE II*<br><br>*2 5408 ED PROF I* | *2 Directed Elective Credits:*<br><br>5364 INTRP RLT<br>*1 Direct Elec credit*<br>4508 TECH BUS COMM<br>*1 Directed Elec credit* | *4 Directed Elective Credits:*<br><br>5364 INTRP RLT<br>*1 Direct Elec credit*<br>4508 TECH BUS COMM<br>*1 Directed Elec credit*<br>4530 DIGI CITI<br>*1 Directed Elec credit* | *9 Directed Elective Credits:*<br><br>5593 BF MANT I<br>*6 Directed Elec credits*<br>5892 WBL TRADE<br>*3 Directed Elec credits* | *9 Directed Elective Credits:*<br><br>5594 BF MANT II<br>*6 Directed Elec credits*<br>5892 WBL TRADE<br>*3 Directed Elec credits* | *10 Directed Elective Credits:*<br><br>5520 AV MAINT<br>*6 Directed Elec credits*<br>5608 ADV MFTG I<br>*2 Directed Elec credits*<br>5606 ADV MRTG II | *6 Directed Elective Credits:*<br><br>5458 ADV HOS MNGMT<br>*6 Directed Elec credits* |

**Attachment 6 – Course Scope and Sequence**

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|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | 4528 DIG APPS RESP *Directed Elec credit* | | | *2 Directed Elec credits* | |
| | | | | | | | | | | | | ADMF 101, 102; AVIM 101, 110, 111, 112 | |

| **College Courses (Ivy Tech)** | **MRKT 101 (dual credit) -or- PRN MRKT (non-dual credit)** | **BUSN 101 (dual credit) -or- BUS MGMT (non-dual credit)** | **BIOL 101** | **CINS 101** | **MATH 136** | **ENGL 111** | **IVY 111** |
|---|---|---|---|---|---|---|---|
| **Pre-requisite** | ACCUPLACER 80 in Sentence Skills 76 in Reading 40 in Elem Alg or 60 Arith | ACCUPLACER 80 in Sentence Skills 76 in Reading and 40 in Elem Alg or 60 Arith | ACCUPLACER 80 in Sentence Skills 76 in Reading 40 in Elem Alg or 60 in Arith | ACCUPLACER 80 in Sentence Skills 76 in Reading | ACCUPLACER 74 in Elem Alg and 1 CLM | ACCUPLACER 80 in Sentence Skills 76 in Reading | |
| **Credits Awarded** | 5914 PRIN MRKT *2 Directed Elec credits* | 4562 BUS MGMT *2 Directed Elec credits* | 3026 BIO II 2 Science credits | 4528 DIG APPS RESP 2 *Directed Elec credit* | 2544 ADV MTH CC *2 math credits* | 1124 ADV ENG CC *2 English credits each* | 0532 COL-ENT PREP 1 GE credit 0500 BAK SKLLS: IVY TECH 1 GE credit |

**Attachment 6 – Course Scope and Sequence**

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|---|---|---|---|---|---|---|---|
| | | | | | | | |

# THE EXCEL CENTER 2016-17

# REMEDIATION & CORE 40 COURSE SCHEDULING GUIDE

version 9.8.16

| TERM | STEM & OTHER | | HUMANITIES | |
|---|---|---|---|---|
| 1st | **BAS SKLS: MATH A** [90 min]<br>Prerequisites: • Placement A <70%<br>2 Gen. Electives (BAS SKLS: MATH A) /term | **ENL or Elective Option** [90 min]<br>See Next Page | **BAS SKLS: ENG 1** [90 min]<br>Prerequisites: • SRI <600L • SPI Cut<br>2 Gen. Electives (BAS SKLS: READING A)/term | **BAS SKLS: WRITE 1** [90 min]<br>Prerequisites: • iExcel Writing Checklist Placement • Coenrolled in ENG 1 or or ENL A<br>2 Gen. Electives (BAS SKLS: WRITE 1) /term |
| 2nd | **BAS SKLS:MATH B** [90 min]<br>Prerequisites: • Placement A >70% • Placement B < 70%<br>2 Gen.Electives (BAS SKLS: MATH B) /term | **PE I&II & Health** [90 min]<br>Prerequisites: • PE: SRI 400+ • Health: SRI 600+<br>2 PE 1 HEALTH | **BAS SKLS: ENG 2** [90 MIN]<br>Prerequisites: • SRI 600-1000L<br>2 Gen. Electives (BAS SKLS: READING B)/term<br>**ENGLISH 2***<br>1 GE (DEV READNG) 1 ENG (SHORT STRS) | **BAS SKLS: WRITE 2** [90 min]<br>Prerequisites: • iExcel Writing Checklist Placement • Coenrolled in ENG 2 or ENL B<br>2 GE (BAS SKLS: WRITE 2) /term<br>**WRITING 2***<br>1 GE (LANG LAB) 1 ENG (GRAMMAR) |
| 3rd | | **Financial Foundations** [90 min]<br>Prerequisites: • MATH A • SRI 900+<br>3 DE (2BM, 1PFR) 1ECON | **ENGLISH 3** [3hrs]<br>Prerequisites: • SRI 1000+ • rSkills 80%+<br>2 ENG (CLASS LIT, COMP) 1 WLD HIST 1 GE (LANG LAB) | |
| 4th | **ALG IA & ENRICH** [3hrs]<br>Prerequisites: • Placement B >70%<br>1 Gen. Elective (ALG I LAB) 1 ALG I | **US HIST B** [90 min]<br>Prerequisites: • SRI 1000+<br>1 US HIST | **ENGLISH 4** [90 min]<br>Prerequisites: • ENG 3 • 2+ Eng Cr<br>2 ENG (EXPO & WLD LIT) 1 WLD HIST | |
| 5th | **ALG IB & ENRICH** [3hrs] *ECA Course*<br>Prerequisites: • Algebra IA<br>1 Gen. Elective (ALG I LAB) 1 ALG I | | **ENGLISH 5** [3 hrs] *ECA Course*<br>Prerequisites: • ENG 4 • 4+ Eng Cr<br>2 ENG (AMER LIT) 1 US HIST 1 GOVT | |
| 6th | **GEOM A&B** [3hrs]<br>Prerequisites: • Algebra IB<br>2 GEOM | **Biology / BIO 101** [3hrs] (Coenrolled with SCI RSRH IS - See p.2)<br>Prerequisites: • SRI 1000+<br>2 BIOL | | **DUAL CREDIT OR CAREER PATH**<br>See next page. |
| 7th | **ALG II / MATH 136** [3hrs]<br>Prerequisites: • Geometry<br>2 ALG II | **ICP** [90 min] (Coenrolled with SCI RSRH IS - See p. 2)<br>Prerequisites: • Concurrent with ALG IB or higher<br>2 Physical Sci. (ICP) | **Humanities Option**<br>See next page. | **Senior Seminar** [90 min]<br>Required by all students within their last two terms.<br>1 DE (PREP CC) 1 GE (CARR INFO) |

*Awarded upon course completion

Dual credit courses vary by school. See next page for ACCUPLACER requirements to earn additional credits.

8 credit max

- THE FOLLOWING COURSE OFFERINGS VARY BY SCHOOL -

| Additional Science Elective Options | | |
|---|---|---|
| **Course:** | **Pre-requisites** | **Credits** |
| Environmental Science [Varies by school] | SRI 900+ | 2 Science Electives<br>• ENVSCI |
| Science Research [Varies by school] | SRI 900+ | 1 Science Elective/ project (2 credit max)<br>• SCI RSRH IS |
| Earth & Space Science [90 min] | SRI 900+ | 2 Science Electives<br>• EAS |

| Additional Humanities Options | | |
|---|---|---|
| **Course:** | **Pre-requisites** | **Credits** |
| SPEECH [90 min] | SRI 1000+<br>May co-enroll with CPIE | 2 English<br>• SPEECH |
| Film Literature [90 min] | SRI 1000+ | 2 English<br>• FILM LIT<br>• CREAT WRIT |
| Contemporary Literature [90 min .5 term] | SRI 1000+ | 1 English<br>• CONTEMP LIT |
| ENGLISH 6 [90 min] | ENG 5 | 2 ENG (ENG 12)<br>1 US HIST<br>1 DE (DIG APPS RESP) |

ENL

| Additional General & Directed Elective Options | | |
|---|---|---|
| **Course:** | **Pre-requisites** | **Credits** |
| Seminar for Success (SFS) | COC students only | 2 General Electives<br>• BAS SKLS: STUDY<br>• CARR INFO |
| Study Skills | None | 2 General Electives<br>• BAS SKLS: STUDY |
| Computer Basics | None | 1 General Elective<br>• BAS SKLS: COMP<br>1 Directed Elective<br>• DIG APPS RESP |
| Peer Tutoring | Instructor Recommendation | 1 General Elective<br>• PEER TUTR |
| Current, Problems, Issues, & Events | SRI 1000+<br>May co-enroll with Speech | 1 General Elective<br>• CPIE |
| World language option for non-native speakers | Director's approval<br>Contact GEI | 1 Direct Elective /per course |

**ENL STUDENTS ONLY**

**ENL A** [90 min]
Prerequisites:
- W-APT 1 or 2
- WIDA 1 or 2

2 ENG (ENL)

**ENL B** [90 min]
Prerequisites:
- W-APT 1 or 2
- WIDA 1 or 2

2 ENG (ENL)

Remediation or elective course

Course contains Core 40 credit(s)

Career & Collge Pathway course

| College Courses | Pre-requisite | Weighted HS Credits Awarded |
|---|---|---|
| MATH 136 | ACCUPLACER<br>74 in Elem Alg<br>1 CLM | 2 General Electives or Math for Acad. Honors<br>• ADV MATH CC |
| BIOL 101<br>*Meets Science Elective Requirement* | ACCUPLACER<br>80 in Sentence Skills<br>76 in Reading<br>40 in Elem Alg or 60 ARITH | 2 Science Electives<br>• BIO II CC |

See next page for more college credit opportunities.

## Industry Certifications and Career Pathway Dual Credits

An Excel Center graduation requirement includes at least one career pathway or dual credit course. This requirement may have been met in a previous school.

| Dual Credit Programs | Pre-requisite | Certification Exam(s) | HS Credits Awarded | College Credits Awarded |
|---|---|---|---|---|
| **HIRE Tech IA** | 1000+L | Dual credit final exams | 2 Direct Electives<br>• 1- INT ADV MFTG<br>• 1- ADV CTE CC | MPRO 100, 106 |
| **HIRE Tech IB** | 1000+L | MSSC: Certified Logistics Associate<br>APICS: Logistics<br>APICS: Operations<br>APICS: Safety | 4 Direct Electives<br>• 1- INT ADV MFTG<br>• 1- ADV CTE CC<br>• 2- ADV MFTG I | |
| Early Childhood Education<br>**ECE** | 1000+L | ECE Pre-Pac | 5 Direct Electives<br>• 1- CHLD DEV<br>• 1- ADVCHLDDEV<br>• 3- ECE I | |
| Child Development Associate<br>**CDA A** (non-college credit)<br>**CDA A CC** (college credit) | 1000+L<br>For CC,<br>ACCUPLACER<br>60 Sentence Skills<br>55 in Reading | | 4 Direct Electives<br>• 1- CHLD DEV<br>• 3- ECE I | ECED 103 |
| **CDA B** (non-college credit)<br>**CDA B CC** (college credit) | | | 5 Direct Electives<br>• 2- ADVCHLDDEV<br>• 3- ECE I | ECED 101 |
| CDA Internship<br>**CDA I** | CDA A & B | | 4 Direct Electives<br>• 2- ECE II<br>• 2-ED PROF I | |

| | | | | |
|---|---|---|---|---|
| CDA Internship<br>**CDA I** | CDA A & B | | 4 Direct Electives<br>• 2- ECE II<br>• 2-ED PROF I | |
| Aviation<br>**AVI** (non-college credit)<br>**AVICC** (college credit) | 1000+L | Assembly Mechanic Certificate | 10 Direct Electives<br>• 6 - AV MAINT<br>• 2 - ADV MFTG I<br>• 2 – ADV MRTG II | ADMF 101, 102<br>AVIM 101, 110, 111, 112 |

## CERTIFICATION COURSES CONTINUED

| Certification Programs | Certification Exam | HS Credits Awarded |
|---|---|---|
| Certified Medical Assistant<br>**CMA** | 451 | 8 Direct Electives<br>• 2- HSE II ST<br>• 3- HLTH ED I: CMA<br>• 3- HSE II NURS |
| Certified Nursing Assistant<br>**CNA** | nurse | 8 Direct Electives<br>• 2- HSE II ST<br>• 3- HLTH ED I: CNA<br>• 3- HSE II NURS |
| Dental Assisting<br>**DENT ASSIST** | | 8 Direct Electives<br>• 2- MED TERMS<br>• 6- HLTH ED I: DENT |
| Emergency Medical Technician<br>**EMT** | EMT | 6 Direct Electives<br>• 3- EMS<br>• 3- HLTH ED I: EMT |
| Medical Coding<br>**MED CODE** | 429<br>(medical coding certificate) | 8 Direct Electives<br>• 2- MED TERMS<br>• 6- HLTH ED I |
| **Patient Access** | N/A | 8 Direct Electives<br>• 2- MED TERMS<br>• 6- HLTH ED I |
| Pharmacy Technician<br>**PHARM TECH** | phte | 8 Direct Electives<br>• 6- HLTH ED I<br>• 2- HSE II PHARM |
| **Phlebotomy** | PBT(ASCP) | 8 Direct Electives<br>• 3- HLTH ED I: PHLE<br>• 2- HSE II ST<br>• 3- WBL HS |
| Hospitality Management<br>**ADV HOS MNGMT** | CGSP, Certified Front Desk Professional | 6 Direct Electives<br>• 6- ADV HOS MNGMT |
| Certified Business Professional<br>**CBP** | CBP Exam | 4 Direct Electives<br>• 1- INTRP RLT<br>• 1-TECH BUS COMM<br>• 2- DIG APPS RESP |
| Customer Service/ Technical Support Representatives<br>**CSR** | TSIA-CSP-1 | 2 Direct Electives<br>• 1- INTRP RLT<br>• 1-TECH BUS COMM |
| **CompTIA A+** | aplus | 8 Direct Electives<br>• 4- COMP TECH<br>• 4- NTWK FUND |
| Microsoft Office Specialist<br>**MOS** | MOS | 2 Direct Electives<br>• 2- DIG APPS RESP |
| Microsoft Technology Associate<br>**MTA** | MTA Software Development Fundamentals & Software Testing Fundamentals | 4 Direct Electives<br>• 2- INTO CS<br>• 2- COM SCI I |

| Certification Programs | Certification Exam | HS Credits Awarded |
|---|---|---|
| Associated Builders & Contractors Core Curriculum<br>**ABCCC** | | 6 Direct Electives<br>• 3-CONST TECH I<br>• 3-CONSTR TECH II |
| Certified Apartment Maintenance Technician<br>**AMTI**<br>**AMTII** | | 9 Direct Electives<br>• 6- BF MANT I<br>• 3- WBL TRADE<br>9 Direct Electives<br>• 6- BF MANT II<br>• 3- WBL |
| CADD Technician/AutoCAD<br>**CADD1**<br>**CADD2** | Auto CAD certified user | 6 Direct Electives<br>• 2- COMP DES<br>• 2- INT ENG DES<br>• 2- ADV MFTG I<br>6 Direct Electives<br>• 6- ADV MFTG II |
| CNC MACH OPERATOR<br>**CNC** | NIMS CNC Operator Level 1 | 6 Direct Electives<br>• 3- PCSN MACH I<br>• 3- PCSN MACH II |
| Certified Production Technician<br>**CPT A**<br>**CPT B**<br>**CPT C**<br>**CPT D** | MSSC: Safety<br>MCCC: Quality Practices & Measurement<br>MSSC: Manufacturing Processes & Production<br>MSSC: Maintenance Awareness | Direct Electives /course<br>• 1- ADV MFTG I: SAFTEY<br>• 2- ADV MFTG I: QUALITY<br>• 1- ADV MFTG I: MAN PROC & PROD<br>• 2- ADV MFTG I: MAIN AWRN |
| **Welding** | AWS | 8 Direct Electives<br>• 6- WELD TECH I<br>• 2- WELD TECH II |
| **CDL** | CDL | 6 Direct Electives<br>• TRACT OPER: CDL |
| Global Logistics Associate<br>**GLA** | | 6 Direct Electives<br>• 1-INT ADV MFTG<br>• 5-ADV MFTG I |
| Logistics<br>**LRC** | MSSC: Certified Logistics Associate | 6 Direct Electives<br>• 3-TRACT OPER: LRC<br>• 3-WOMH |
| **Forklift** | OSHA Forklift Certification | 3 Direct Electives<br>• WOMH: Forklift |

## Dual College Credits Courses OR Non College Credit Course Equivalents

| College Courses | ACCUPLACER Pre-requisite | Weighted HS Credits Awarded |
|---|---|---|
| **BUSN 101** | 80 in Sentence Skills<br>76 in Reading | 2 Direct Electives<br>• BUS MGMT CC |
| **MRKT 101** | 80 in Sentence Skills<br>76 in Reading<br>40 Elem Alg. or 60 Arith. | 2 Direct Electives<br>• PRN MRKT CC |
| **CINS 101** | 80 in Sentence Skills<br>76 in Reading | 2 Direct Electives<br>• DIG APPS RESP CC |
| **COMM 101** | 80 in Sentence Skills<br>76 in Reading | 2 English Credits<br>• ADV ENG CC |
| **ENGL 111**<br>**ENGL 112** | 69+ Reading Diagnostic<br>4+ WritePlacer<br>C or above in ENGL 111 | 2 English Credits each<br>• ADV ENG CC |

The grades for the following credits will not be weighted:

| Non College Credits | Pre-requisite | Non-Weighted HS Credits Awarded |
|---|---|---|
| BUS MGMT<br>[90 min] | SRI 1000+<br>Passed ALG ECA | 2 Direct Electives<br>• BUS MGMT |
| PRN MRKT<br>[90 min] | SRI 1000+<br>Passed ALG ECA | 2 Directed Electives<br>• PRN MRKT |
| DIG APPS RESP<br>[90 min] | SRI 1000+<br>Passed ALG ECA | 2 Directed Electives<br>• DIG APPS RESP |
| ADV SPEECH | | 2 English<br>• ADV SPEECH |
| ENGLISH 7<br>[90 min] | ENG 5<br>Passed ECA | 2 English<br>• ADV COMP<br>• LBRY MEDIA |

| | | | |
|---|---|---|---|
| **IVY TECH 111**<br>**IVY TECH 120** | None | 2 General Electives<br>• COL-ENT PREP<br>• BAS SKLS: IVY TECH | Non Applicable – no ACCUPLACER requirement |

**Attachment 7 – Academic Exit Standards**

The Excel Center's academic content is aligned with the Indiana College and Career Readiness Standards and uses these standards throughout its coursework and lesson plans. All standards were deconstructed and opportunities for integrating courses were utilized to make the content explicit and meaningful.

Students who graduate The Excel Center are expected to complete all high school graduation requirements for the State of Indiana as established by the Indiana Department of Education. All students are encouraged to work towards a Core 40 diploma. Students will earn credit hours by successfully demonstrating mastery over the standards established in each course. Teachers assess mastery by monitoring student work and evaluating their growth. By integrating coursework across domains, some course offerings allow students to earn multiple credits through the work of one class. Each class is mapped to indicate which credits apply toward a Core 40 diploma and students earn credit by demonstrating satisfactory completion of a course and earning a passing grade higher than a D in that course.

In addition to all requirements set forth by the Indiana Department of Education, students at The Excel Center are expected to complete the following five courses:

1. American Studies A
2. American Studies B
3. Financial Foundations
4. Algebra II
5. Chemistry

Standards for these courses are included below. Because they are combinations of multiple courses, the standards for American Studies A and B and Financial Foundations are listed on a lesson-by-lesson basis to demonstrate the combinations of courses in The Excel Center model. Students are evaluated on their mastery of the standards listed in each course.

**American Studies A Course Mapping**

| | Content | E/LA 11-12 | US |
|---|---|---|---|
| **Day 1** | Forms of Gov't ECA Style Prompt | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 1.1-1.2 |
| **Day 2** | US Revolution Thomas Paine Dec. of Independence | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 1.1, 1.2 |
| **Day 3** | Federalist Papers 1984 | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 1.1, 1.2 |
| **Day 4** | Legislative Branch | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | |
| **Day 5** | Executive Branch Electoral College | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | |

| | | | |
|---|---|---|---|
| **Day 6** | Judicial Branch Westboro Article<br>Court Cases | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 1.1, 1.2 |
| **Day 7** | Thematic Essay Push vs. Pull New Colossus | RL.1-4; RV.2-3<br>RN.1-4; W.1,3,4,6<br>SL.2-3 | 2.1, 2.2, 2.3 |
| **Day 8** | Chinese Exclusion Act<br>ECA Style Essay | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.1, 2.2, 2.3, 3.7 |
| **Day 9** | Irish Immigrants<br>How to write intros and conclusions | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.1, 2.2, 2.3, 3.7 |
| **Day 10** | Rural vs Urban Poetry (Whitman and Sandberg) | RL.1-4; RV.2-3<br>RN.1-4; W.1,3,6<br>SL.2-3 | |
| **Day 11** | Social Darwinism | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.4, 2.5, 3.7 |
| **Day 12** | Industrial Revolution DBQ | RN.1-4; W.1,3-6<br>SL.2-3; RL.2-3<br>RV.2-3 | All of 2 |
| **Day 13** | Finish DBQ Essay Robber Barons<br>Captains of Industry | RN.1-4; W.1,3-6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.4, 2.5, 3.7 |
| **Day 14** | Manifest Destiny<br>Westward Expansion | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.6 |
| **Day 15** | Spanish American War<br>Yellow Journalism | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.6, 3.6 |
| **Day 16** | White Mans Burden Things Fall Apart<br>St. Crisipin's Day | RL.1-4; RN.4<br>W.1,3,6; SL.2-3<br>RV.2 | |
| **Day 17** | Mexican American War<br>Battle of the Alamo | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.1, 3.2, 3.6 |
| **Day 18** | 14 Points<br>Treaty of Versailles | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.3, 3.4, 3.5 |
| **Day 19** | The impact of imperialism on American music | RL.1-4; RV.2-3<br>RN.4; W.1,3,6 | |
| **Day 20** | Progressive DBQ (end with essay) | RN.1-4; W.1,3-6 | 3.8 |

| | | | |
|---|---|---|---|
| | | SL.2-3; RL.2-3<br>RV.2-3 | |
| **Day 21** | Jacob Riis<br>Upton Sinclair | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.8 |
| **Day 22** | Triange Shirtwaist Factory Fire | RL.1-4; RV.2-3<br>RN.1-4; W.1,3,6<br>SL.2-3 | 3.8 |
| **Day 23** | Discuss other famous Progressives | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.8 |
| **Day 24** | Diagnostic assessment Re-test | | |
| **Day 25** | Review for Final Exam | | |
| **Day 26** | Final Exam pt. 1 (multiple choice and ECA essay) | RL.1-4; RV.2-3;<br>RN.1-4; W.1,3,4,6<br>SL.2-3 | |
| **Day 27** | Final Exam pt. 2 (DBQ) | RN.1-4; W.1,3-6<br>SL.2-3; RL.2-3<br>RV.2-3 | |
| **Day 28** | Intro Graphic Novel Project | RL.1-4; W.1-6<br>RL,2-4; RV.2-3 | |
| **Day 29** | Plan Graphic Novels | W.1,3-6; RL.2-4<br>RV.2-3 | |
| **Day 30** | Work on Graphic Novel | W.1,3-6; RL.2-4<br>RV.2-3 | |
| **Day 31** | Work on Graphic Novel | W.1,3-6; RL.2-4<br>RV.2-3 | |
| **Day 32** | Finish Graphic Novel | W.1,3-6; RL.2-4<br>RV.2-3; SL.1-4 | |

**American Studies B Course Mapping**

| | Content | E/LA | US | CompApp |
|---|---|---|---|---|
| **Day 1** | Flapper Culture<br>St. Valentine's Mass | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 1.1, 1.2 | 2.1-5<br>4.1-2 |

| | | | | |
|---|---|---|---|---|
| **Day 2** | Age of Excess<br>Great Gatsby<br>HarlemRenaissance | RL.1-4; RN.4<br>W.1,3,6; SL.2-3<br>RV.2-3 | 1.1, 1.2 | 2.1-5<br>4.1-2 |
| **Day 3** | DBQ Great Depress. | RN.1-4; W.1,3-6<br>RL.2-4; RV.2-3 | 1.1, 1.2 | 2.1-5<br>4.1-2 |
| **Day 4** | Introductions<br>Conclusions<br>Finish DBQ Essay | RN.1-4; W.1,3-6<br>RL.2-4; RV.2-3 | | 2.1-5<br>4.1-2 |
| **Day 5** | Depression | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | | 2.1-5<br>4.1-2 |
| **Day 6** | Harvest Gypsies<br>Dust Bowl Prezi | RL.1-4; RN.4<br>W.1,3,6; SL.1-4<br>RV.2-3 | 1.1, 1.2 | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 7** | Pearl Harbor<br>Japanese Relocate | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.1, 2.2, 2.3 | 2.1-5<br>4.1-2 |
| **Day 8** | Soldiers Experience<br>Life on Home Front<br>ECA Prompt | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.1, 2.2, 2.3, 3.7 | 2.1-5<br>4.1-2 |
| **Day 9** | *Terrible Things*<br>Holocaust Victims<br>*Night* | RL.1-4; RN.1-4<br>RV.2,3; W.1,3,6<br>SL.1-4 | 2.1, 2.2, 2.3, 3.7 | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 10** | Holocaust Poetry<br>WWII Propaganda | RL.1-4; RN.2-3<br>RV.2,3; W.1,3,6<br>SL.1-4 | 2.1,2.2, 2.3 | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 11** | Iron Curtain<br>Truman Doctrine<br>Marshall Plan | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | | 2.1-5<br>4.1-2 |
| **Day 12** | McCarthyism<br>*The Crucible* | RL.1-4; RN.2-3<br>RV.2,3; W.1,3,6<br>SL.1-4 | 2.4, 2.5, 3.7 | 2.1-5<br>4.1-2 |
| **Day 13** | Platt Amendment<br>Bay of Pigs<br>Cuban Missle Crisis | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | All of 2 | 2.1-5<br>4.1-2 |
| **Day 14** | | RL.1-4; RN.4 | 2.4, 2.2, 3.7 | |

| | | | | |
|---|---|---|---|---|
| | Evaluate Kenedy's Decision -- Poster | W.1,3,6; SL.2-3<br>RV.2-3 | | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 15** | Intro Vietnam<br>*Things They Carried*<br>Protest Songs | RL.1-4; RN.4<br>W.1,3,6; SL.2-3<br>RV.2 | 2.6 | 2.1-5<br>4.1-2 |
| **Day 16** | Transatlantic Slave Trade<br>Equiano | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 2.6, 3.6 | 2.1-5<br>4.1-2 |
| **Day 17** | Reconstruction Era<br>Black Codes<br>Sharecropping | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | | 2.1-5<br>4.1-2 |
| **Day 18** | Emmett Till | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.1, 3.2, 3.6 | 2.1-5<br>4.1-2 |
| **Day 19** | *To Kill a Mockingbird* | RL.1-4; RN.2-3<br>RV.2,3; W.1,3,6<br>SL.1-4 | | 2.1-5<br>4.1-2 |
| **Day 20** | Various Civil Rights Groups -- SAS<br>Pics from CRM | RL.1-4; RN.4<br>W.1,3,6; SL.2-3<br>RV.2-3 | 3.3, 3.4, 3.5 | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 21** | *Letter from a Birmingham Jail*<br>"I Have a Dream" | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.8 | 2.1-5<br>4.1-2 |
| **Day 22** | Literacy Test<br>Other Minorities<br>Brown v Board | RN.1-4; W.1,3,4,6<br>SL.2-3; RL.2-3<br>RV.2-3 | 3.8 | 2.1-5<br>4.1-2 |
| **Day 23** | Nixon - Present | RN.1-4; W.1,3,6<br>SL.2-3; RL.2-3<br>RV.2-3 | | 2.1-5<br>4.1-2 |
| **Day 24** | Review for Exam | | | |
| **Day 25** | FINAL EXAM! | RL.1-4; RV.2-3;<br>RN.1-4; W.1,3-6<br>SL.2-3 | | 2.1-5<br>4.1-2<br>7.1-3 |
| **Day 26** | Intro research | W.1-5 | | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2 |

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| | | | | 5.1-4<br>6.1-3 |
| **Day 27** | Begin researching | W.1-5 | | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 28** | Type Paper | W.1-5 | | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |
| **Day 29** | Finish Paper | W.1-5; SL.1-4 | | 1.1-10<br>2.1-5<br>3.1-7, 2-7, 5-15<br>4.1-2<br>5.1-4<br>6.1-3 |

**Financial Foundations**

| | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** |
|---|---|---|---|---|
| Procedure Topics | -Introduction to class<br>-What is Economics?<br>-Definition of other key terms: resource, consumer, goods, services, capitalism, democracy, meritocracy<br>-Concept of the American Dream | -What is the difference between a need and a want?<br>-What is choice and how is it employed in economic decisions?<br>-What is opportunity cost?<br>-Analysis of cost per use of items students own | -What is money and what function does it have in a society?<br>-How does one calculate interest?<br>-How does one save effectively and what methods of saving exist? | -How does one open a checking or savings account?<br>-How does an individual write a check?<br>-How does an individual balance a checkbook?<br>-What is fractional reserve banking? |
| Economics | 1.1, 1.4, 1.5 | 1.2, 1.9 | 6.1, 6.4 | 6.3 |
| Business Math | | 1.1.1, 1.1.2, 1.1.3 | 1.3.1, 3.2.1 | |
| Personal Finance | | 1.4.2 | 4.1.2, 6.1, 6.1.2, 6.2.1, 6.3 | 3.2.1, 3.2.2, 3.3.2 |

**Week Two**

Objective: Students will be able to describe and analyze the role of money, banking and financial services in their lives.

| | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** |
|---|---|---|---|---|
| Procedure Topics | -What is credit?<br>-What is a finance charge?<br>-What are the advantages and | -What is online banking?<br>-What are the pros and cons of | -Definitions: supply and demand<br>-What is a shortage and what is a surplus? | -Graphing supply and demand<br>-Determining price from supply and demand |

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|---|---|---|---|---|
| | disadvantages of having a credit card?<br>-What should one look for when registering for a credit card? | doing banking online?<br>-How do online services compare between banks? | -Review concept of producers and consumers<br>-What role do producers and consumers play in the market? | -Definition: equilibrium price<br>-Why might supply and demand change within a market? |
| Economics | 6.6 | 6.6, 6.7 | 2.1, 2.3, 2.4 | 2.1, 2.3, 2.4 |
| Business Math | 3.2.8 | 1.1.1, 1.1.2, 1.1.3, 3.1.3 | 3.2.1, 3.2.2, 3.2.3, 3.2.4 | 3.2.1, 3.2.2, 3.2.3, 3.2.4 |
| Personal Finance | 3.3.1, 4.2, 4.2.1, 4.2.2 | 3.3.1 | | |

**Week Three**

Objective: Students will be able to explain principles of supply and demand and how they affect their personal purchases, using purchasing a car as an example.

| | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** |
|---|---|---|---|---|
| Procedure Topics | -How do supply and demand impact the price of a product?<br>-How does the length and interest of a loan affect monthly payments and overall cost?<br>-Car loan project | -How does an individual make calculations to determine the cost of a major purchase?<br>-What is the difference between leasing and buying a car?<br>-Car loan project | -How does buying compare to leasing a product?<br>-What does it cost to maintain a vehicle, including insurance?<br>-What different types of insurance exist? | -How does one shop for insurance?<br>-How do different types of insurance compare?<br>-What factors influence a person's insurance costs? |
| Economics | 6.4, 6.6 | 6.4, 6.6 | | |
| Business Math | 3.2.2, 3.2.3 | 3.2.2, 3.2.3 | 2.1.9, 3.2.4 | 2.1.9, 3.2.4 |
| Personal Finance | 4.1.2, 4.1.3 | 4.1.2, 4.1.3 | 5.2, 5.2.1, 5.2.2, 5.2.3 | 5.2, 5.2.1, 5.2.2, 5.2.3 |

**Week Four**

Objective: Students will be able to demonstrate an understanding of the way market structures function and how decisions made in the market affect individuals and the larger economy.

| | **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURSDAY** |
|---|---|---|---|---|
| Procedure Topics | -What are the three main types of business organizations?<br>-What are the advantages and disadvantages of each? | -What are the characteristics of competition?<br>-What are the four types of competition?<br>-How do businesses make money? | -What is stock?<br>-What is the stock market?<br>-How does one calculate the value of stock?<br>-What are the risks involved in the stock market? | -How does one do research on a stock?<br>-How does one read a stock table?<br>-Stock Market Simulation |
| Economics | 3.1, 3.2 | 3.2, 3.4, 3.5, 6.8 | 6.8 | 6.8 |
| Business Math | | | 3.2.6, 3.2.7 | 3.2.6, 3.2.7 |
| Personal Finance | 6.3.1 | 6.3.1 | 6.3.1, 6.4, 6.4.1, 6.5, 6.5.1 | 6.3.1, 6.4, 6.4.1, 6.5, 6.5.1 |

**Week Five**

Objective: Students will analyze the role government plays in an economy, including regulating the market and the collection and distribution of taxes.

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY |
|---|---|---|---|---|
| Procedure Topics | -In general, what role does a government play in a capitalistic economy?<br>-What are the limits of government intervention in the economy?<br>-What does the government spend its money on? | -What are the sources of revenue for a government?<br>-How are tax revenues spread out between local, state, and federal budgets?<br>-How are taxes used in an individual's own community? | -What are the differences between progressive, regressive, and proportional taxes?<br>-How does an individual read tax charts and estimate taxes?<br>-What is the difference between gross and net pay? | -What are payroll taxes?<br>-What percentage of a person's salary goes toward Social Security or Medicare?<br>-How does one calculate a sales tax and a discount price? |
| Economics | 4.1, 4.4 | 4.4, 4.5 | 4.4, 4.5, 4.6, 4.7, 4.8 | |
| Business Math | 6.1.2, 6.1.3, 6.1.5 | | 1.3.1, 2.1.2 | 2.1.2, 4.1.2, 4.1.3 |
| Personal Finance | | | 3.4.1, 2.3 | 6.1.1 |

**Week Six**

Objective: Students will be able to define GDP and inflation, and demonstrate how individual choice impacts a nation's economy.

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY |
|---|---|---|---|---|
| Procedure Topics | -What are aggregate supply and aggregate demand?<br>-Define GDP, economic growth, unemployment, and inflation.<br>-How are GDP and economic growth measured? | -What are the limits to using GDP as a measure of economic welfare?<br>-Explain the four phases of the business cycle on a macroeconomic level. | -What effects have major historical events (such as WWII or the IT boom) had on business cycles in the United States?<br>-What is inflation? | -How does inflation impact the choices made by individuals?<br>-What is the difference between cost-push and demand-pull inflation? |
| Economics | 5.1, 5.2 | 5.3, 5.4 | 5.5, 5.6 | 5.7, 5.8 |
| Business Math | 1.1.2, 1.1.3, 1.1.4 | | 1.1.2, 1.1.3, 1.1.4. 3.2.7 | 1.3.1 |
| Personal Finance | | | 3.4.1, 3.4.2, 6.3.2 | 6.3.2 |

**Week Seven**

Objective: Students will be able to define fiscal and monetary policy and the tools used to enforce it, as well as analyze the impact national and individual debt have on a nation's economy.

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY |
|---|---|---|---|---|
| Procedure Topics | -What is fiscal policy?<br>-What is monetary policy? | -What are the negative effects of unemployment and inflation? | -How does the government impact the level of | -How do we predict future debt based on |

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| | -What are the tools for fiscal/monetary policy, and how are they used? | -How can individuals protect themselves from unemployment and inflation? | unemployment and inflation?<br>-How does the government use fiscal policy to promote employment and growth?<br>-What is the Federal Reserve's role in matters of fiscal policy? | present information?<br>-How will future spending and taxation affect our national debt?<br>-How does fiscal/monetary policy impact the individual (student)? |
| Economics | 7.1, 7.2 | 7.3, 7.4 | 7.5, 7.6 | 7.7, 7.8, 7.9 |
| Business Math | 3.2.1-5 | 3.2.1-5 | 3.2.1-5, 3.2.7, | 3.2.1-5, 1.3.1, 1.3.2 |
| Personal Finance | 4, 3.3.3, 3.4, 4.3.1, 6.3.1 | 4, 3.3.3, 3.4, 4.3.1, 6.3.1 | 4, 3.3.3, 3.4, 4.3.1, 6.3.1 | 4, 3.3.3, 3.4, 4.3.1, 6.3.1 |

**Week Eight**

Objective: Students will analyze the mechanics of trade within a nation and abroad.

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY |
|---|---|---|---|---|
| Procedure Topics | -Why is trade beneficial? (individually, nationally, internationally)<br>-What are different ways in which people trade? (cash, stocks, barter, futures, underground economy)<br>-Absolute vs. comparative advantage | -What are barriers to trade?<br>-Why do some countries establish barriers to trade?<br>-Balance of trade vs. balance of payments<br>-How do trade relations affect the American economy? | -Labor productivity in the U.S. vs. the rest of the world<br>-What are exchange rates?<br>-How do exchange rates affect individuals living in the U.S.? | -What is free trade?<br>-Is free trade beneficial or harmful to the global economy? Why?<br>-Who does free trade benefit? |
| Economics | 8.1, 8.2, 8.10 | 8.3, 8.4, 8.5, 8.10 | 8.6, 8.7, 8.8, 8.10 | 8.9, 8.10 |
| Business Math | 4.1.4 | 1.3.1-.5 | 4.1.6, 1.3.1-.5 | |
| Personal Finance | 1.1.1, 1.2 | | | |

**Algebra II Standards**

| | |
|---|---|
| • AII.CNE.1- Operations with complex numbers | Complex numbers and expressions |
| • AII.CNE.2- Radicals and exponents | Complex numbers and expressions |
| • AII.CNE.3- Operations with rational expressions | Complex numbers and expressions |
| • AII.CNE.4- Equivalent forms of rational expressions | Complex numbers and expressions |

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| • AII.CNE.5- Division of polynomials | Complex numbers and expressions |
| • AII.CNE.6- Partial sums of arithmetic and geometric series | Complex numbers and expressions |
| • AII.F.1- Function identification | Functions |
| • AII.F.2- Composition of functions | Functions |
| • AII.F.3- Inverse functions | Functions |
| • AII.F.4- Graphing inverse functions | Functions |
| • AII.F.5- Graphing composite functions | Functions |
| • AII.SE.1- System of linear and quadratic equations | System of equations |
| • AII.SE.2- Systems of three linear equations and three variables | System of equations |
| • AII.SE.3- Real world application of three variable systems | System of equations |
| • AII.Q.1- Real world application of quadratics | Quadratics |
| • AII.Q.2- Completing the square and properties of quadratics | Quadratics |
| • AII.Q.3- Discriminant and number of solutions | Quadratics |
| • AII.EL.1- Recursive and explicit arithmetic and geometric sequences | Exponential and logarithmic equations and functions |
| • AII.EL.2- Graph functions expressed symbolically and show key features of the graph by hand in simple cases | Exponential and logarithmic equations and functions |
| • AII.EL.3- Rate of change in exponential functions | Exponential and logarithmic equations and functions |
| • AII.EL.4- Transforming expressions for exponential functions | Exponential and logarithmic equations and functions |
| • AII.EL.5- Relationship between exponential and logarithmic functions | Exponential and logarithmic equations and functions |
| • AII.EL.6- Laws of exponents and logarithms | Exponential and logarithmic equations and functions |
| • AII.EL.7- Real world application of exponential equations | Exponential and logarithmic equations and functions |
| • AII.PR.1- Solving polynomial equations | Polynomial, rational, and other equations and functions |
| • AII.PR.2- Graph relations and functions and describe their properties | Polynomial, rational, and other equations and functions |
| • AII.PR.3- Solve simple rational and radical equations in one variable | Polynomial, rational, and other equations and functions |
| • AII.DSP.1- Make inferences from sample surveys, experiments, and observational studies | Data analysis, statistics, and probability |
| • AII.DSP.2- Use technology to model bivariate data and interpret the correlation coefficient | Data analysis, statistics, and probability |
| • AII.DSP.3- Identify and interpret measures of central tendency and variation in a data set | Data analysis, statistics, and probability |
| • AII.DSP.4- Apply theoretical models of probability to interpret random events | Data analysis, statistics, and probability |
| • AII.DSP.5- Identify and apply concepts of dependent and independent events | Data analysis, statistics, and probability |
| • AII.DSP.6- Multiplication counting principle, permutations and combinations | Data analysis, statistics, and probability |

**Chemistry Standards**

| Standards | Big Ideas | Learning Targets/Objectives |
|---|---|---|
| C.1.1 Based on physical properties, differentiate between pure substances and mixtures. | - Compare and contrast pure substances and mixtures<br>- Physical property<br>- Chemical property<br>- Element, compound<br>- Homogeneous/ heterogeneous | Students will be able to differentiate between a pure substance and a mixture |
| C.1.2 Observe and describe chemical and physical properties of different types of matter and designate them as either extensive or intensive. | - Intensive/extensive<br>- Chemical/physical properties<br>- Define matter | Students will be able to define an extensive and intensive property<br><br>Students will be able to explain the properties of three different states of matter |
| C.1.3 Recognize observable indicators of chemical changes. | - Chemical changes<br>- Indicators of chemical change | Students will be able to determine if a chemical change has occurred due to observable indicators such as color change. |
| C.1.4 Describe physical and chemical changes at the molecular level. | - Atoms, molecules<br>- Bonding | Students will be able to analyze the differences between a chemical or a physical change. |
| C.1.5 Describe the characteristics of solids, liquids and gases and changes in state at the molecular level. | - Compare and contrast states of matter<br>-Change of state<br>- Volume, shape<br>- movement of particles<br>- Atoms | Students will be able to define the properties of a solid, liquid and a gas. |
| C.1.6 Explain and apply the law of conservation of mass as it applies to chemical processes. | - Conservation of mass (equation)<br>- Chemical equations (reactants, products)<br>- Possibly balancing equations in here | Students will be able to apply their knowledge of conservation of mass and how it relates to chemical processes and reactions. |
| C.1.7 Define density and distinguish among materials based on densities. Perform calculations involving density. | - Density (d=m/V)<br>- How to measure mass/volume<br>- Units of mass and volume<br>- Dimensional analysis | Students will be able to define density and communicate the importance of density when describing a substance.<br><br>Students will be able to calculate density. |
| C.2.1 Describe how models of atomic structure changed over time based on available experimental evidence and understand the current model of atomic structure. | - Atom as a solid sphere, plum pudding, etc to Bohr<br>- Indirect evidence | Students will be able to identify the Bohr model and how this model describes an atom's structure |
| C.2.2 Describe how the subatomic particles (i.e., protons, neutrons and electrons) contribute to the structure of an atom and recognize that the particles within the nucleus | - Protons, neutrons, electrons (charges, mass, location in the atom)<br>- Like charges repel, opposite charges attract | Students will be able to explain the structure of an atom using protons, electrons and neutrons. |

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| are held together against the electrical repulsion of the protons. | | |
| C.2.3 Determine the number of protons, neutrons, and electrons in isotopes and in those isotopes that comprise a specific element. Relate these numbers to atomic number and mass number. | - Periodic table<br>- Isotopes<br>- Compare and contrast atomic number and mass number | Students will be able to compute the number of neutrons in an atom and differentiate between different atoms depending on this neutron number. |
| C.2.4 Calculate the average atomic mass of an element from isotopic abundance data. | - Weighted average<br>- Percentages as decimals<br>- Mass number vs atomic mass<br>- Isotopes | Students will be able to calculate the average atomic mass of an element. |
| C.2.5 Write the electron configuration of an element and relate this to its position on the periodic table. | - Blocks of the periodic table<br>- Groups/periods<br>- Noble gas configuration | Students will be able to construct electron configurations for elements on the periodic table. |
| C.2.6 Use the periodic table and electron configuration to determine an element's number of valence electrons and its chemical and physical properties. | - Common charge of groups based on number of electrons lost/gained<br>- Alkali metals/alkaline earth/etc | Students will be able to analyze an electron configuration to determine an element’s valence electrons. |
| C.2.7 Compare and contrast nuclear reactions with chemical reactions. | - Nucleus changing vs only changing number of electrons<br>- Show them a nuclear equation vs chemical equation | Students will be able to analyze the difference between a chemical and a nuclear reaction. |
| C.2.8. Describe how fusion and fission processes transform elements present before the reaction into elements present after the reaction. | - Define fusion/fission<br>- Show them reactions of each type and have them identify each<br>- Conservation of mass | Students will be able to determine the difference between fusion and fission. |
| C.2.9 Understand that the radioactive decay process is random for any given atom but that this property leads to a predictable and measurable exponential decay of a sample of radioactive material. Know how to calculate the initial amount, the fraction remaining or the half-life of a radioactive isotope when given two of the other three variables. | - Half life<br>- Radioactive decay is random<br>- | Students will be able to analyze a half life decay table. |
| C.3.1 Describe, compare and contrast the characteristics of the interactions between atoms in ionic and covalent compounds. | - Ionic vs covalent<br>- Metals vs nonmetals and location on the periodic table<br>- Charges formed<br>- Polyatomic ions | Students will be able to summarize the difference between an ionic and a covalent bond |
| C.3.2 Compare and contrast how ionic and covalent compounds form. | - Sharing vs electron transfer | Students will be able to summarize the difference between an ionic and a covalent bond |

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| C.3.3 Draw structural formulas for and name simple molecules. | - Lewis structures<br>- Lewis dot structures | Students will be able to name compounds. |
| C.3.4 Write chemical formulas for ionic compounds given their names and vice versa. | - Naming rules<br>- Prefixes | Students will be able to name compounds when given the structural formula. |
| C.3.5 Compare and contrast ionic, covalent network, metallic and polar and non-polar molecular crystals with respect to constituent particles, strength of bonds, melting and boiling points and conductivity; provide examples of each type. | - Define ionic, covalent network, metallic bonding (compare and contrast electron behavior)<br>- Properties of each<br>- What does it mean to be polar vs nonpolar<br>- Electron affinity/ electronegativity | Students will be able to compare different types of molecules and their properties. |
| C.4.1 Predict products of simple reactions such as synthesis, decomposition, single replacement and double replacement. | -Five types of reactions | Students will be able to classify different types of reactions. |
| C.4.2 Balance chemical equations using the law of conservation of mass and use them to describe chemical reactions. | - Balancing equations | Students will be able to balance chemical reactions.<br><br>Students will apply their knowledge on conservation of mass in terms of balancing equations. |
| C.4.3 Given mass of the sample, use the mole concept to determine the number of moles and number of atoms or molecules in samples of elements and compounds. | - Avogadro's number<br>- Molar mass<br>- Dimensional analysis | Students will be able to calculate moles and grams based on what is given. |
| C.4.4 Using a balanced chemical equation, calculate the quantities of reactants needed and products made in a chemical reaction that goes to completion. | - Stoichiometry<br>- Using coefficients for hypothetical situations<br>- Mole ratios | Students will be able to calculate the amount of reactant and product used when looking at balanced chemical equations. |
| C.4.5 Describe, classify and give examples of various kinds of reactions-synthesis (i.e., combination), decomposition, single displacement, double displacement and combustion. | - Look at 4.1<br>- | |
| C.4.6 Determine oxidation states and identify the substances gaining and losing electrons in redox reactions. | - Rules for assigning oxidation numbers<br>- Identify what was oxidized, reducing, and the oxidizing/reducing agents<br>- LEO the lion says GER; OIL RIG | Students will be able to analyze redox reactions |
| C.4.7 Perform calculations to determine the composition of a compound or mixture when given the formula. | - Percent composition | Students will be able to determine the percent composition of elements in a compound. |

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| C.5.1 Use kinetic molecular theory to explain changes in gas volumes, pressure, moles and temperature. | - 5 postulates of KMT<br>- Combined gas law (Charles, Boyles, Avogadro's) | Students will be able to manipulate the Boyle's and Charles' Laws to calculate volume and pressure in gases. |
| C.5.2 Using the ideal gas equation of state *PV = nRT,* calculate the change in one variable when another variable is changed and the others are held constant. | - PV=nRT<br>- Conversion practice if necessary | Students will be able to calculate pressure, volume, moles and temperature using the ideal gas equation. |
| C.5.3 Given the equation for a chemical reaction involving one or more gases as reactants, products or both, calculate the volumes of gas when assuming the reaction goes to completion and the ideal gas law holds. | - PV=nRT<br>- 1 mole = 22.4 L<br>- Mole ratios, stoichiometry | Students will be able to calculate the volume of a gas at standard volume |
| C.6.1 Explain that atoms and molecules are in constant motion and that this motion increases as thermal energy increases. | - States of matter<br>- Phase changes<br>- Temperature | Students will be able to analyze the relationship between heat and motion in gas particles. |
| C.6.2 Distinguish between the concepts of temperature and heat flow in macroscopic and microscopic terms. | - Explain how heat flows (what we see vs what is happening on a molecular level) | Students will be able to differentiate between heat and temperature. |
| C.6.3 Classify chemical reactions and phase changes as exothermic or endothermic. | - Endothermic/exothermic<br>- Phase diagrams | Students will be able to determine the difference between endothermic and exothermic. |
| C.6.4 Solve problems involving heat flow and temperature changes by using known values of specific heat, phase change constants (i.e., latent heat values) or both. | - q=mCΔT<br>- Latent heat equations | Students will be able to perform specific heat calculations. |
| C.7.1 Describe the composition and properties of types of solutions. | - Solute, solvent, saturated, unsaturated, supersaturated<br>- Conductivity of ionic solutions? | Students will be able to communicate the different components and types of solutions. |
| C.7.2 Explain how temperature, pressure and polarity of the solvent affect the solubility of a solute. | - Like dissolves like<br>- Laundry detergents/oils and solubility<br>- Factors increasing solubility | Students will be able to determine how changing temperate and pressure affects solubility. |
| C.7.3 Describe the concentration of solutes in a solution in terms of molarity. Perform calculations using molarity, mass and volume. | - M =moles/V<br>- Extra conversion practice (if needed) | Students will be able to calculate molarity. |
| C.7.4 Prepare a specific volume of a solution of a given molarity when provided with a known solute. | - Molarity formula | Students will be able to find the amount of moles needed to calculate a certain molarity when volume is given. |
| C.7.5 Explain how the rate of a reaction is qualitatively affected by changes in concentration, temperature, surface area and the use of a catalyst. | - Factors affecting solubility<br>- Define catalyst | Students will be able to determine if a reaction will speed up or slow down based on manipulations to the system. |
| C.7.6 Write equilibrium expressions for reversible reactions. | - Write equilibrium expression | Students will be able to write equilibrium expressions. |

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| C.8.1 Use Arrhenius and Brønsted-Lowry definitions to classify substances as acids or bases. | - Acidic protons, hydronium ion<br>- Define acids and bases with Arrhenius and Bronsted-Lowry definitions<br>- pH scale | Students will be able to classify substances and compounds as either an acid or a base based on their properties. |
| C.8.2 Describe the characteristic properties of acids and bases. | - pH scale<br>- $H^+$ and $OH^-$ | Students will be able to compare acids and bases. |
| C.8.3 Compare and contrast the dissociation and strength of acids and bases in solutions. | - Define dissociation<br>- | Students will be able to analyze titration curves. |
| C.8.4 Given the hydronium (H3O+) ion concentration in a solution, calculate the pH and vice versa. Explain the meaning of these values. | - pH= -log[$H^+$]<br>- $10^{-pH}$ = [$H^+$] | Students will be able to calculate pH of a solution given the hydrogen ion concentration. |
| C.8.5 From acid-base titration data, calculate the concentration of an unknown solution. | - Indicators<br>- Molarity formula<br>- Balance an equation<br>- Identify an acid/base<br>- Define neutralization<br>- Mole ratios/stoich | Students will be able to find the molar concentration when given a pH value. |
| C.9.1 Use structural formulas to illustrate carbon atoms' ability to bond covalently to one another to form many different substances. | - Lewis structures/Lewis dot<br>- Covalent bonding<br>- Carbon as basis for organic chemistry<br>- Carbon = covalent = life | Students will analyze carbon's special bonding capabilities. |
| C.9.2 Illustrate the variety of molecular types formed by the covalent bonding of carbon atoms and describe the typical properties of these molecular types. | - Single, double, triple bonds<br>- Carbohydrates | Students will be able to determine whether a double bond can be used when creating a resonance structure. |

**Attachment 8 – School Calendar and Schedule**

The Excel Center operates a balanced school calendar with minimal breaks. The Excel Center's 2017-2018 academic calendar for The Excel Center is on the following page. The Excel Centers located in Indiana all follow the same, general school calendar. School calendars are determined at the end of the prior school year, after the IDOE publishes mandatory assessment testing windows.

The Excel Center will operate with 162 days of accelerated, scheduled instruction and an additional 39 days of instruction available to students, as needed, on Fridays, functioning year-round. A typical school week includes four days of fixed-time classroom instruction (Monday through Thursday) and one day of self-directed student learning (Friday). Fridays are available for teachers and staff to prepare for classes, hold case conferences, staff meetings, and one-on-one tutoring sessions and meetings with students.

The school calendar is designed to reinforce educational success by accelerating the pace at which students can earn credits. The school's class schedule operates on 8-week terms. This structure gives students the ability to earn credits on a faster pace than in a traditional 15-week semester. After an 8-week term is completed, students are then assigned into a new schedule with new coursework.

# The Excel Center

# 2017-2018

## School Year Calendar

### July 17

| 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 | | | | | |

### August 17

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
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| 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 17

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
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| 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 17

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
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| 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 17

| Su | M | Tu | W | Th | F | Sa |
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| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | | |

### December 17

| Su | M | Tu | W | Th | F | Sa |
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| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | | | | | | |

### January 18

| 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 | | | |

### February 18

| 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 18

| 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 18

| 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 18

| Su | M | Tu | W | Th | F | Sa |
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| 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 | | |

### June 18

| 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 |

- School Day
- PD for Staff
- Students & Staff Off
- iExcel
- First/Last Day of each Term

**Term Start/End Dates**

1 Jul 17-Sep 5
2 Sept 11-Nov 1
3 Nov 8-Jan 23
4 Jan 29-Mar 23
5 Apr 9-Jun 8

**Other Important Dates**

Winter Graduation: Feb 15 & 16
Summer Graduation: Jun 14 & 15
GEI Kickoff: July 11th
First Count Day: Sept 15
Second Count Day: Feb 1
GEM Conference: April 3

**iExcel Dates**

July 12 & 13
Sept 6 & 7
Nov 2 & 3
Jan 24 & 25
Apr 5 & 6

**ECA Testing Windows**

Dec 6-15
May 16-25
Aug 22-31

**ISTEP Testing Windows**

Mar 14-23



Calendar Template by Vertex42.com
http://www.vertex42.com/calendars/school-calendar.html

Classes consist of extended teaching times of 90 minutes each, with some courses merging periods together for 3-hour blocks. Classes may be scheduled from 9:00 am until 8:00 pm, Monday through Thursday, depending on the needs of students in a given term. Not all students will be enrolled in classes for all 6 periods each day, but will attend classes when their schedules allow, fitting coursework in together with work or family responsibilities. Each day of fixed-time instruction may provide up to 9 hours of instructional time available for students. Each week may include up to 36 hours of fixed-length instruction.

The Excel Center staff will adjust classroom schedules to meet the students' credit needs and their ability to attend classes for each term. On Fridays, students are able to continue on online credit recovery courses, take diagnostic or formative examinations, work with a tutor, or meet with their instructors in one-on-one meetings. Students are encouraged to use Fridays to schedule or take care of other personal obligations such as doctor appointments.

- Language Arts: 1 ½ hours (90 minutes)
- Mathematics: 3 hours (180 minutes)
- Science: 3 hours (180 minutes)
- Social Studies: 1 ½ hours (90 minutes)

Because of the variability of student schedules within the 8-week terms, a student may not take time in all four subjects during a given school day. As a result of flexible scheduling to meet student body credit needs, some courses (including basic skills instruction) will be offered every term, while others (higher-level math and English courses) are offered less frequently but at least every other term. For a student enrolled in any one of these classes; however, he or she would have minimum instructional times for the following subjects (above).

Four examples of daily schedules are provided in order to show a variety of scenarios that are responsive to the students enrolled at The Excel Center during a given term. These are actual schedules at existing Excel Centers. During times where staff not scheduled to teach a course, they may be conducting administrative duties (in the case of School Directors, Lead Teachers, Lead Coaches, and Special Education Coordinators) or other duties, as assigned.

The first two examples demonstrate schedules from two different terms at the same school where only teachers are teaching any courses.

**Example Schedule 1 (Franklin Rd., Term 2, 2016)**

| Classroom | Staff | Period 1 9:00 – 10:30 | Period 2 10:45 – 12:15 | Period 3 1:00 – 2:30 | Period 4 2:45 – 4:00 | Period 5 (TBA) | Period 6 (TBA) |
|---|---|---|---|---|---|---|---|
| 216 | Kledzik | English 5 | | | | | |
| 217 | Capps | English 1 | English 4 | English 4 | English 6 | | |
| 219 | Cox | English 3 | | English 3 | | | |
| 220 | Jones | Math A | English 2 | English 2 | English 111 | | |
| 235 | Emery | Financial Foundations | | | | | |
| 236 | Durham | Algebra II | | Geometry | | | |
| 237 | Winberry | HIRE TECH A | Senior Seminar | | | Pharmacy Tech | |
| 238 | Beam | Algebra IB | | Algebra IA | | | |
| 252 | Vincent | Math B | Math A | Math B | Math A | | |

**Example Schedule 2 (Franklin Rd., Term 2, 2016)**

| Classroom | Staff | Period 1 9:00 – 10:30 | Period 2 10:45 – 12:15 | Period 3 1:00 – 2:30 | Period 4 2:45 – 4:00 | Period 5 (TBA) | Period 6 (TBA) |
|---|---|---|---|---|---|---|---|
| 216 | Kledzik | | | English 5 | | | |
| 217 | Capps | English 4 | English 1 | English 4 | English 6 | | |
| 219 | Cox | English 3 | | English 3 | | | |
| 220 | Jones | Financial Foundations | English 2 | English 2 | English 111 | | |
| 235 | Beam | Algebra IB | | Algebra IA | | | |
| 236 | Durham | Algebra II | | Geometry | | | |
| 237 | Sturgeon | Math A | Math B | Math B | Math A | | |
| 238 | Winberry | | | Certified Business Professional | Senior Seminar | Independent Senior Seminar | |
| 252 | Vincent | Earth Space Science | Integrated Chemistry & Physics | Integrated Chemistry & Physics | Earth Space Science | | |

The third example demonstrates a schedule where coaches are teaching remedial course and are certified to teach certification courses.

**Example Schedule 3 (Kokomo, Term 1, 2016)**

| Classroom | Staff | Period 1 9:00 – 10:30 | Period 2 10:45 – 12:15 | Period 3 1:00 – 2:30 | Period 4 2:45 – 4:00 | Period 5 5:00 – 7:00 | Period 6 (TBA) |
|---|---|---|---|---|---|---|---|
| 110 | Livarchik | Algebra IB | | Algebra IB | | | |
| 111 | Rutherford | Algebra IA | | Math B | Math A | | |
| 113 | Cowan | Algebra II | | Geometry | | | |
| 115/16 | Hendricks | Integrated Chemistry & Physics | Math B | Biology | | | |
| 170 | Pearson | Math A | ECE | English 1 | *Resource* | | |
| 127 | Scott | | English 4 | English 4 | | | |
| 128 | Warner | English 5 | | English 2 | Writing 2 | | |
| 130 | Milam | English 3 | | English 5 | | | |
| | Ashley | *Coaching* | *Coaching* | A+ Lab | *Coaching* | | |
| | Jones | *Coaching* | *Coaching* | *Coaching* | Certified Business Professional | Customer Service Representative | |
| | Dawalt | A+ Lab | *Coaching* | *Coaching* | *Coaching* | | |
| | Fritsch | | A+ Lab | | | Senior Seminar | |
| | Gall | Hire Tech B | | | | | |
| | *Via Distance Learning* | | | English 111 | Microsoft Office Specialist | | |

The fourth example demonstrates a schedule where evening courses are being scheduled.

**Example Schedule 4 (Meadows, Term 2, 2016)**

| Classroom | Staff | Period 1 9:00 – 10:30 | Period 2 10:45 – 12:15 | Period 3 1:00 – 2:30 | Period 4 2:45 – 4:00 | Period 5 4:15 – 5:45 | Period 6:15-9:15 |
|---|---|---|---|---|---|---|---|
| 001 | Moore | English 5 | | Integrated Chemistry & Physics | | | |
| 002 | Hines | Math B | Math A | Math A | Financial Foundations | | |
| 003 | Elliott | English 4 | Financial Foundations | English 4 | English 6 | | |
| 004 | Conlisk | Algebra IB | | Math B | Math B | | |
| 005 | Durham | Algebra IA | | | | | |
| 109 | Ladapo | Algebra II | | Algebra IA | | | |
| 201 | Montgomery | English 1 | English 2 | English 3 | | | |
| 202 | Carter | English 3 | | English 5 | | | |
| 203 | McKinney | | | Geometry | | Financial Foundations | Algebra IA |
| 205 | Bast | | | Writing 2 | Senior Seminar | | Certified Medical Assistant |
| 206 | Daniel | *Coaching* | *Coaching* | *Coaching* | Health | | |
| 207 | Turner | *Coaching* | *Coaching* | *Coaching* | *Coaching* | Certified Business Professional | |
| | Dangerfield | *Coaching* | A+ Lab | *Coaching* | *Coaching* | | |
| | Osbourne | *Coaching* | *Coaching* | A+ Lab | *Coaching* | | |
| | Strickland | A+ Lab | *Coaching* | *Coaching* | *Coaching* | | |

**Attachment 9 – Enrollment Policy**

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 older[1]
- 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 relatively 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 an Excel Center's active database in the school's student information system upon meeting particular criteria described below.
2. Withdrawn Student: A student transferred from being enrolled in the active database within the school's student information system to inactive status, based on meeting particular criteria described in (withdrawal policy).
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 an on-line class by logging in to the designated on-line 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.[2]

Procedures for Enrollment

On an ongoing basis, GEI provides information to community groups, potential new students, and other individuals inquiring about enrollment at The Excel Center. Central office staff, as well as the school's office manager and other school staff answer any questions the inquiring individual has about the school.

To enroll in The Excel Center, a student must complete a series of online enrollment forms, which include: name and contact information; demographic information; home language survey; whether the student plans to use the drop-in center for child care; information regarding previous IEP/special education services; and a transcript from the student's last school of attendance. In cases where a

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[1] Students under that 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.

[2] Because The Excel Center operates a drop-in 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.

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 at www.excelcenter.org/enroll, request a paper application, or visit The Excel Center to complete a paper application.
    - The application includes: name and contact information; demographic information; home language survey; whether the student plans to use the drop-in center for child care; and information regarding previous IEP/special education services. and a transcript from the student's last school of attendance or a signed "Zero Credit Disclosure," which signifies that a student has never earned high school credits at any previous school

*Step 2: Submit a Transcript*

- Applicants should contact their last high school of attendance and ask for their transcript to be submitted to GEI's central office.
    - In cases where a student is having difficulty obtaining his/her transcripts, The Excel Center or central office 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 iExcel*

- iExcel is a required, one-day orientation program before classes begin.
    - During iExcel, students learn about the culture of The Excel Center as well as the expectations of all students. Students also participate in diagnostic math and reading assessments to help determine students' skill-level as well as 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 at least one of the first 3 days of Week 1 following iExcel completion 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 term.

<u>Lottery</u>

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 publically 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 with a 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 is back-filled by students on the waiting list. The waiting list is maintained year-round with students who are wishing to enroll in the school during the next phase of enrollment. Students are added to the waiting list on a first-come, first-serve basis and are queued until the next iExcel orientation takes place.

To accelerate their integration into the school, students on the waiting list are encouraged to fill out the enrollment packet 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 their life circumstances change. If an Enrolled Student becomes a Withdrawn Student, then he or she may again become an Enrolled Student if the Withdrawn Student meets the above criteria, with exception to completing iExcel New Student Orientation which 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 next steps toward college and career attainment. Further, the typical Excel Center student faces multiple challenges that may prevent an uninterrupted progression towards a diploma. (i.e., some students need a break, leave of absence, etc.).

Only one of the following must be met for an Enrolled Students to become a Withdrawn Student:

- The student formally withdraws self 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 attends in-person classes, or a combination of in-person and on-line classes, accrues 16 days of absences in any term. If the student is an online participant only, he or she will be withdrawn if they fail to log in to the on-line student coursework tracking system within an established time period designated below. School Directors may use their discretion to waive aforementioned criteria based on a student's progress in assigned class.
- The student completes the registrar-defined Priority Withdrawal Requirements. (In this instance, a Withdrawal Form is not necessary.) This would include all Indiana Department of Education categories eligible for this form, including but not limited to: transferring to another school, incarceration, moving out of state, death, hospitalization, etc.

**Attachment 10 – School Discipline Policy**

The purpose of the School Discipline Policy is to provide fair and reasonable rules and procedures to promote human development and to ensure that students do not engage in conduct that in any way interferes with the education of The Excel Center students. If a student chooses to engage in any of the following behaviors, the student will receive a warning. After multiple warnings, the student may be asked to leave The Excel Center campus.

School Discipline Philosophy:
Students will have made a conscious choice and effort to enroll in and attend The Excel Center and to reengage in their education. The Excel Center's philosophy regarding student behavior and discipline is that all students – regardless of race, gender, age, background, ability, or any other factor – have the basic right to an education and the opportunity to earn a high school diploma as well as maintaining their basic health, safety and security. The Excel Center expects that all members of the school community conduct themselves in a manner to uphold and maintain these rights. Students or faculty who engage in behaviors that negatively impact students receiving an education or any individual's health or safety will be dismissed from The Excel Center immediately. This philosophy is consistent with The Excel Center's school model, mission and educational philosophy because it places an emphasis on students and enabling them to overcome any and all barriers in order to achieve a high school diploma.

The Excel Center takes discipline very seriously and views suspensions and expulsions as a "last resort" option to ensure a safe and secure school environment. In order to ensure that the school's suspension and expulsion rates remain low and that they are in-line with relevant averages, the school will implement Progressive Discipline Steps (see below). These steps are 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.

Building Personal Responsibility at The Excel Center:
The purpose of disciplinary action at The Excel Center is 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.

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 which may have resulted from the student's behavior.

The hearing officer or designee shall file a written charge with the School Director. If the School Director deems that there are reasonable grounds for expulsion, he or she shall appoint a Hearing Examiner.

Threats and Bodily Harm to Others:
Threats, bullying and intimidation will not be tolerated at school or in connection with students, families and staff of The Excel Center. Students will be subject to expulsion for verified acts which threaten, bully or intimidate others. Fighting will not be tolerated at school. A student who physically strikes another individual will be subject to expulsion.

Expulsion:
After a proper investigation and hearing, a student may be expelled when his or her behavior renders it appropriate. Repeated offenses may lead to expulsion.

When the School Director or designee makes a recommendation for expulsion of students, the School Director or designee may 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. 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 of controlled substance as defined in Indiana code.
- Threats, bullying, and intimidation will not be tolerated at school or in connection with students, families, and staff of The Excel Center. Students will be subject to expulsion for verified acts which threaten, bully or intimidate others.
- Fighting will not be tolerated at school. A student who physically strikes another individual will be subject to expulsion.

Progressive Discipline Standard Operating Procedures
Purpose:

- To assist the student in understanding that a performance problem and opportunity for improvement exists
- To assist the student in overcoming performance problems and satisfy The Excel Center expectations
- To prepare students for conduct that is expected in the workplace
- To provide students with opportunities for due process in disciplinary actions

Progressive Discipline Steps

| | |
|---|---|
| **Counseling / Restatement of Expectations** | Counseling by the coach is the initial step to mentor or modify performance<br>• Meet with the student and affirm expectations regarding performance.<br>• Discuss the performance deficit or behavioral concern.<br>• Provide a timeline and resources for improvement.<br>• Report consequences for no improvement.<br>• Document in student file. |
| **Verbal Reprimand** | After an investigation, follow the procedure outlined above for the counseling process. Discuss previous informal efforts and the current problem. A note should be in the student's file documenting the verbal warning. |
| **Written Reprimand** | At this time, the coach or instructor may want to consult the School Director. After an investigation, follow the procedure outlined above for the counseling process, with the exception of providing documentation to the staff person in the letter of reprimand. The letter should outline previous informal efforts and the current problem. Tools such as attendance improvement plans, behavior improvement plans and performance improvement plans can be used at this stage. These plans can be used at increments of 30, 60 and 90 days. Send copies of the signed letter and improvement plan to appropriate staff and to the student file. Student may be referred for a hearing after two written reprimands. |
| **Short Suspension (or equivalent)** | Fully investigate the concern, followed by discussion with the student. Summarize previous progressive discipline and the current problem, and specify the timeframe for suspension in writing. Identify further discipline and possible termination as a potential consequence for not meeting and maintaining standards for improvement. Provide copies as for the written reprimand. Student must have a hearing before returning to The Excel Center. Record of progressive discipline must be submitted to the panel of staff/students sitting in on the hearing. |
| **Long Suspension (or equivalent)** | Fully investigate the concern, followed by discussion with the student. Summarize previous progressive discipline and the current problem, and specify the timeframe for suspension in writing Identify further discipline and possible termination as a potential consequence for not meeting and maintaining standards for improvement. Provide copies as for the written reprimand. Student must have a hearing before returning to The Excel Center. Record of progressive discipline must be submitted to the panel of staff/students sitting in on the hearing. |

| | |
|---|---|
| **Expulsion** | Expulsion may be necessary when discipline is not successful in improving performance. The coach and/or instructor should review the performance history and record of progressive discipline with the School Director. Schedule a final meeting to include the coach and/or instructor, School Director and the student at which a letter of expulsion is provided. All students receiving expulsion will be afforded a due process hearing. |

Hearings:
Hearings should consist of two staff. They are responsible for determining guilt or innocence. They make recommendations for retention or expulsion to school leadership. They can impose additional consequences/sanctions. The panel of staff/students will provide documentation of the hearing for the student's file. They are to notify the student of decisions made. They are also responsible for explaining the appeal process.

Discipline for Students with Disabilities:
In instances where students are over the age of 21, The Excel Center will not need to continue to implement an IEP (which does not serve students over age 21) goals for students who are expelled and will not need to contract services for students who are expelled.

Nevertheless, The Excel Center is aware that for students under age 21 who have IEPs, the following procedures will be used[1]:

1. "School personnel may remove the student with a disability who violates the code of conduct from his or her current placement to an appropriate interim alternative educational setting (IAES), another setting, or suspension, for not more than 10 consecutive school days to the extent those alternatives are applied to students without disabilities.
2. School personnel may remove the student with a disability who violates the code of conduct from his or her current placement for additional removals of not more than 10 consecutive school days in that same school year for separate incidents of misconduct as long as those removals do not constitute a CHANGE OF PLACEMENT.

School personnel may apply the relevant disciplinary procedures to students with disabilities in the same manner and for the same duration as the procedures that would be applied to students without disabilities, if:

- In the MANIFESTATION DETERMINATION review, the behavior that gave rise to the violation of the code of conduct is determined not to be a manifestation of the student's disability;
- SERVICES DURING PERIODS OF REMOVAL are provided to the student; and
- Notification of a CHANGE OF PLACEMENT is given to the student.

School personnel must provide the students removed to a disciplinary alternative education program

[1] "The Legal Framework for the Child-Centered Special Education Process," retrieved from http://framework.esc18.net/display/Webforms/ESC18-FW-Summary.aspx?FID=154&DT=T&LID=en

with written notice of the school's obligation to provide the student with an opportunity to complete coursework required for graduation that: Includes information regarding all methods available for completing the coursework; and States that the methods available for completing the coursework are available at no cost to the student. School personnel may remove the student to an IAES without regard to whether the behavior is determined to be a manifestation of the student's disability, if: There are SPECIAL CIRCUMSTANCES; and The removal is for not more than 45 school days."

Students will be removed from the school immediately for the same length of time as a student without an IEP is the expulsion is the result of drugs or bringing a weapon to school.

**Attachment 11 – Evidence of Support from Community Partners**

This attachment contains letters of support from the following organizations:

- Ivy Tech Community College
- Mayor of Muncie
- Muncie Home Ownership and Revitalization
- Muncie Housing Authority

Dear Staff and Members of the Indiana Charter School Board:

On behalf of Ivy Tech Community College, this letter is to indicate support for Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus Indiana.

The Excel Center has a strong history of developing effective ways to provide adult high school students with accelerated learning opportunities for post-secondary education, and individualized career planning. Having graduated over 2,300 adult students and nearly 90% of those graduates earning college credit or an industry-recognized credential by the time they graduate, The Excel Center has already provided a significant impact in the Anderson, Indianapolis, Kokomo, Lafayette, Richmond, and Shelbyville communities.

Thousands of individuals drop out of high school each year, crippling their career potential as employers seek workers with higher skills and specialization. Furthermore, we understand that the typical high school dropouts have worse health, lower incomes, and fewer job opportunities that those who completed their high school education. With over 700,000 Hoosiers without a high school diploma, there is a clear and present need to provide opportunities for those who dropped out of high school to reengage in their education.

With a proven track record of success and a continued need to reach individuals in more communities across Indiana, Ivy Tech Community College strongly encourages you to favorably consider Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus.

Sincerely,

*Corina A. Thompson*

*Project Director, DOL Tech Hire Grant.*

*Ivy Tech Community College - Central Office*

*Cthompson 287@IvyTech.edu*

IVY TECH
COMMUNITY COLLEGE

City of MUNCIE
MUNCIE, INDIANA

Dear Staff and Member for the Indiana charter School Board:

On Behalf of the City of Muncie, this letter is to indicate support of Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Indiana.

The Excel Center has a strong history of developing effective ways to provide adult high school students with accelerated learning opportunities of post-secondary education, and individualized career planning. Having graduated of 2,300 adult students and nearly 90% of those graduates earning collage credit or an industry-recognized credential by the time they graduate, The Excel Center has already provided a significant impact in Anderson, Indianapolis, Kokomo, Lafayette, Richmond, and Shelbyville communities.

Thousands of individuals drop out of high school each year, crippling their career potential as employers seek workers with higher skills and specialization. Furthermore, we understand that the typical high school dropouts have work health, lower incomes, and fewer job opportunities than those who complete their high school education. With over 700,000 Hoosiers without a high school diploma, there is a clear and present need to provide opportunities for those who dropped out of high school to reengage in their educations.

With a proven track record of success and continued need to reach individuals in more communities across Indiana, City of Muncie strongly encourages you to favorably consider Goodwill Education Initiatives' charter application open The Excel Center in Muncie.

Sincerely

Muncie Mayor
Dennis Tyler



300 N. High Street, Muncie, IN 47305 • www.cityofmuncie.com

**MUNCIE HOME OWNERSHIP AND REVITALIZATION**

120 W Charles Street Muncie IN 47305

February 21, 2017

Re: Excel Center in Muncie Indiana

Dear Staff and Members of the Indiana Charter School Board:

On behalf of Muncie Home Ownership and Revitalization, this letter is to indicate support for Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus Indiana.

The Excel Center has a strong history of developing effective ways to provide adult high school students with accelerated learning opportunities for post-secondary education, and individualized career planning. Having graduated over 2,300 adult students and nearly 90% of those graduates earning college credit or an industry-recognized credential by the time they graduate, The Excel Center has already provided a significant impact in the Anderson, Indianapolis, Kokomo, Lafayette, Richmond, and Shelbyville communities.

Thousands of individuals drop out of high school each year, crippling their career potential as employers seek workers with higher skills and specialization. Furthermore, we understand that the typical high school dropouts have worse health, lower incomes, and fewer job opportunities that those who completed their high school education. With over 700,000 Hoosiers without a high school diploma, there is a clear and present need to provide opportunities for those who dropped out of high school to reengage in their education.

With a proven track record of success and a continued need to reach individuals in more communities across Indiana, Muncie Home Ownership and Revitalization strongly encourages you to favorably consider Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus.

Sincerely,

Penny Leach, Director

P [illegible]2-6656 F munciehomecenter@aol.com www.munciehomecenter.com

409 East First Street
Muncie, Indiana 47302
http://www.muncieha.com
Joseph N. Anderson, CEO

February 21, 2017

Re: Excel Center in Muncie Indiana

Dear Staff and Members of the Indiana Charter School Board:

On behalf of the Muncie Housing Authority, this letter is to indicate support for Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus Indiana.

The Excel Center has a strong history of developing effective ways to provide adult high school students with accelerated learning opportunities for post-secondary education, and individualized career planning. Having graduated over 2,300 adult students and nearly 90% of those graduates earning college credit or an industry-recognized credential by the time they graduate, The Excel Center has already provided a significant impact in the Anderson, Indianapolis, Kokomo, Lafayette, Richmond, and Shelbyville communities.

Thousands of individuals drop out of high school each year, crippling their career potential as employers seek workers with higher skills and specialization. Furthermore, we understand that the typical high school dropouts have worse health, lower incomes, and fewer job opportunities that those who completed their high school education. With over 700,000 Hoosiers without a high school diploma, there is a clear and present need to provide opportunities for those who dropped out of high school to reengage in their education.

With a proven track record of success and a continued need to reach individuals in more communities across Indiana, The Muncie Housing Authority strongly encourages you to favorably consider Goodwill Education Initiatives' charter application to open The Excel Center in Muncie, Marian, Bloomington, and Columbus.

Sincerely,

Joseph N. Anderson

Joseph N. Anderson
Chief Executive Officer
765) 289-2291 ext. 216
janderson@muncieha.com

**Attachment 12 – Governance Documents**

This attachment contains:

- Evidence of GEI's federal tax-exempt status from the IRS;
- Articles of Incorporation;
- Board Bylaws; and
- Conflict of Interest Policy.

PBC

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: SEP 1 7 2004

GOODWILL EDUCATION INITIATIVES INC
C/O JAMES M MCCLELLAND
1635 W MICHIGAN ST
INDIANAPOLIS, IN 46222

Employer Identification Number:
20-0749885
DLN:
17053055069044
Contact Person:
MYRON L RANNEY ID# 75618
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Public Charity Status:
170(b)(1)(A)(ii)
Form 990 Required:
Yes
Effective Date of Exemption:
December 19, 2003
Contribution Deductibility:
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Sincerely,

Lois G. Lerner

Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

Letter 947 (DO/CG)

GOODWILL EDUCATION INITIATIVES INC

INFORMATION FOR ORGANIZATIONS EXEMPT UNDER SECTION 501(c)(3)

WHERE TO GET FORMS AND HELP

Forms and instructions may be obtained by calling toll free 1-800-829-3676, through the Internet Web Site at www.irs.gov, and also at local tax assistance centers.

Additional information about any topic discussed below may be obtained through our customer service function by calling toll free 1-877-829-5500 between 8:00 a.m. - 6:30 p.m. Eastern time.

NOTIFY US ON THESE MATTERS

If you change your name, address, purposes, operations or sources of financial support, please inform our TE/GE Customer Account Services Office at the following address: Internal Revenue Service, P.O. Box 2508, Cincinnati, Ohio 45201. If you amend your organizational document or by-laws, or dissolve your organization, provide the Customer Account Services Office with a copy of the amended documents. Please use your employer identification number on all returns you file and in all correspondence with the Internal Revenue Service.

FILING REQUIREMENTS

In your exemption letter we indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. Form 990 (or Form 990-EZ) is filed with the Ogden Submission Processing Center, Ogden UT 84201-0027.

You are required to file a Form 990 only if your gross receipts are normally more than $25,000.

If your gross receipts are normally between $25,000 and $100,000, and your total assets are less than $250,000, you may file Form 990-EZ. If your gross receipts are over $100,000, or your total assets are over $250,000, you must file the complete Form 990. The Form 990 instructions show how to compute your "normal" receipts.

Form 990 Schedule A is required for both Form 990 and Form 990-EZ.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. There are penalties for failing to timely file a complete return. For additional information on penalties, see Form 990 instructions or call our toll free number.

If your receipts are below $25,000, and we send you a Form 990 Package, follow the instructions in the package on how to complete the limited return to advise us that you are not required to file.

If your exemption letter states that you are not required to file Form 990, you

are exempt from these requirements.

UNRELATED BUSINESS INCOME TAX RETURN

If you receive more than $1,000 annually in gross receipts from a regular trade or business you may be subject to Unrelated Business Income Tax and required to file Form 990-T, Exempt Organization Business Income Tax Return. There are several exceptions to this tax.

1. Income you receive from the performance of your exempt activity is not unrelated business income.

2. Income from fundraisers conducted by volunteer workers, or where donated merchandise is sold, is not unrelated business income.

3. Income from routine investments such as certificates of deposit, savings accounts, or stock dividends is usually not unrelated business income.

There are special rules for income derived from real estate or other investments purchased with borrowed funds. This income is called "debt financed" income. For additional information regarding unrelated business income tax see Publication 598, Tax on Unrelated Business Income of Exempt Organizations, or call our toll free number shown above.

PUBLIC INSPECTION OF APPLICATION AND INFORMATION RETURN

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return, or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

FUNDRAISING

Contributions to you are deductible only to the extent that they are gifts and no consideration is received in return. Depending on the circumstances, ticket purchases and similar payments in conjunction with fundraising events may not qualify as fully deductible contributions.

CONTRIBUTIONS OF $250 OR MORE

Donors must have written substantiation from the charity for any charitable contribution of $250 or more. Although it is the donor's responsibility to obtain written substantiation from the charity, you can assist donors by

providing a written statement listing any cash contribution or describing any donated property.

This written statement must be provided at the time of the contribution. There is no prescribed format for the written statement. Letters, postcards and electronic (e-mail) or computer-generated forms are acceptable.

The donor is responsible for the valuation of donated property. However, your written statement must provide a sufficient description to support the donor's contribution. For additional information regarding donor substantiation, see Publication 1771, Charitable Contributions - Substantiation and Disclosure Requirements. For information about the valuation of donated property, see Publication 561, Determining the Value of Donated Property.

CONTRIBUTIONS OF MORE THAN $75 AND
CHARITY PROVIDES GOODS OR SERVICES

You must provide a written disclosure statement to donors who receive goods or services from you in exchange for contributions in excess of $75.

Contribution deductions are allowable to donors only to the extent their contributions exceed the value of the goods or services received in exchange. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as fully deductible contributions, depending on the circumstances. If your organization conducts fundraising events such as benefit dinners, shows, membership drives, etc., where something of value is received, you are required to provide a written statement informing donors of the fair market value of the specific items or services you provided in exchange for contributions of more than $75.

You should provide the written disclosure statement in advance of any event, determine the fair market value of any benefit received, determine the amount of the contribution that is deductible, and state this information in your fundraising materials such as solicitations, tickets, and receipts. The amount of the contribution that is deductible is limited to the excess of any money (and the value of any property other than money) contributed by the donor less the value of goods or services provided by the charity. Your disclosure statement should be made, no later than, at the time payment is received. Subject to certain exceptions, your disclosure responsibility applies to any fundraising circumstances where each complete payment, including the contribution portion, exceeds $75. For additional information, see Publication 1771 and Publication 526, Charitable Contributions.

EXCESS BENEFIT TRANSACTIONS

Excess benefit transactions are governed by section 4958 of the Code. Excess benefit transactions involve situations where a section 501(c)(3) organization provides an unreasonable benefit to a person who is in a position to exercise substantial influence over the organization's affairs. If you believe there may be an excess benefit transaction involving your organization, you should report the transaction on Form 990 or 990-EZ. Additional information can be

found in the instructions for Form 990 and Form 990-EZ, or you may call our toll free number to obtain additional information on how to correct and report this transaction.

EMPLOYMENT TAXES

If you have employees, you are subject to income tax withholding and the social security taxes imposed under the Federal Insurance Contribution Act (FICA). You are required to withhold Federal income tax from your employee's wages and you are required to pay FICA on each employee who is paid more than $100 in wages during a calendar year. To know how much income tax to withhold, you should have a Form W-4, Employee's Withholding Allowance Certificate, on file for each employee. Organizations described in section 501(c)(3) of the Code are not required to pay Federal Unemployment Tax (FUTA).

Employment taxes are reported on Form 941, Employer's Quarterly Federal Tax Return. The requirements for withholding, depositing, reporting and paying employment taxes are explained in Circular E, Employer's Tax Guide, (Publication 15), and Employer's Supplemental Tax Guide, (Publication 15-A). These publications explain your tax responsibilities as an employer.

CHURCHES

Churches may employ both ministers and church workers. Employees of churches or church-controlled organizations are subject to income tax withholding, but may be exempt from FICA taxes. Churches are not required to pay FUTA tax. In addition, although ministers are generally common law employees, they are not treated as employees for employment tax purposes. These special employment tax rules for members of the clergy and religious workers are explained in Publication 517, Social Security and Other Information for Members of the Clergy and Religious Workers. Churches should also consult Publications 15 and 15-A. Publication 1828, Tax Guide for Churches and Religious Organizations, also discusses the various benefits and responsibilities of these organizations under Federal tax law.

PUBLIC CHARITY STATUS

Every organization that qualifies for tax-exemption as an organization described in section 501(c)(3) is a private foundation unless it falls into one of the categories specifically excluded from the definition of that term [referred to in section 509(a)(1), (2), (3), or (4)]. In effect, the definition divides these organizations into two classes, namely private foundations and public charities.

Public charities are generally those that either have broad public support or actively function in a supporting relationship to those organizations.

Public charities enjoy several advantages over private foundations. There are certain excise taxes that apply to private foundations but not to public charities. A private foundation must also annually file Form 990-PF, Return of Private Foundation, even if it had no revenue or expenses.

GOODWILL EDUCATION INITIATIVES INC

The Code section under which you are classified as a public charity is shown in the heading of your exemption letter. This determination is based on the information you provided and the request you made on your Form 1023 application. Please refer to Publication 557 for additional information about public charity status.

GRANTS TO INDIVIDUALS

The following information is provided for organizations that make grants to individuals. If you begin an individual grant program that was not described in your exemption application, please inform us about the program.

Funds you distribute to an individual as a grant must be made on a true charitable basis in furtherance of the purposes for which you are organized. Therefore, you should keep adequate records and case histories that demonstrate that grants to individuals serve your charitable purposes. For example, you should be in a position to substantiate the basis for grants awarded to individuals to relieve poverty or under a scholarship or education loan program. Case histories regarding grants to individuals should show names, addresses, purposes of grants, manner of selection, and relationship (if any) to members, officers, trustees, or donors of funds to you.

For more information on the exclusion of scholarships from income by an individual recipient, see Publication 520, Scholarships and Fellowships.

You are not subject to the specific publishing requirements of Revenue Procedure 75-50, as long as you are operating under a contract with your local government. If your method of operation changes to the extent that your charter is terminated, cancelled, or not renewed, your should notify us. You will also be expected to comply with Revenue Procedure 75-50.

# ARTICLES OF INCORPORATION

# OF

# GOODWILL EDUCATION INITIATIVES, INC.

The undersigned incorporator, desiring to form a corporation (the "Corporation") pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991, as amended (the "Act"), executes the following Articles of Incorporation:

## ARTICLE 1

## Name

**Section 1.01. Name.** The name of the Corporation is:

**Goodwill Education Initiatives, Inc.**

## ARTICLE 2

## Purposes and Powers

**Section 2.01. Type of Corporation.** The Corporation is a public benefit corporation.

**Section 2.02. Primary Purposes.** The purposes for which the Corporation is organized are limited as follows:

**Clause 2.02(a). Educational and Charitable Purposes.**

(i) To provide educational opportunities designed to enable young people to prepare for productive adult lives; and

(ii) To develop, own and operate one or more charter schools, as that term is defined in Indiana Code Sections 20-5.5-1-1, et. seq.

**Clause 2.02(b). Additional Purposes.** In addition, the Corporation is formed for the purpose of assisting and engaging in all activities which serve educational or charitable purposes, which are permitted by the Act, and which are permitted to be carried on by an organization exempt from Federal taxation under the provisions of Section 501(c)(3) of the Code.

**Clause 2.02(c). Limitations.** Nothing contained in these Articles of Incorporation shall be construed to authorize the Corporation to engage in any activities or perform any

functions which are not within the tax-exempt purposes enumerated in Section 501(c)(3) of the Code.

**Section 2.03. Limitations Upon Powers.** No part of the net earnings of the Corporation shall inure to the benefit of any member, Director or Officer of the Corporation or to any private individual, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered by a member, Director, Officer or employee and to pay principal and interest at a reasonable rate not exceeding current market rates on funds loaned or advanced by a member, Director or Officer to the Corporation. No substantial part of the activities of the Corporation shall consist of attempting to propose, support, oppose, advocate the adoption or rejection of, or otherwise influence legislation by propaganda or otherwise, and the Corporation shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of these Articles, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from Federal taxation under Section 501(c)(3) of the Code

## ARTICLE 3

## Registered Office and Registered Agent

**Section 3.01. Registered Office.** The street address of the registered office of the Corporation is:

1635 West Michigan Street
Indianapolis, Indiana 46222

**Section 3.02. Registered Agent.** The name of the registered agent of the Corporation at the registered office is:

James M. McClelland

## ARTICLE 4

## Members

**Section 4.01. Membership.** The Corporation shall have members.

## ARTICLE 5

## Incorporator

**Section 5.01. Name and Address of Incorporators.** The name and address of the incorporators are as follows:

James M. McClelland, President of Goodwill Industries of Central Indiana, Inc.
C. Perry Griffith, Jr., Chairman of Goodwill Industries of Central Indiana, Inc.
1635 West Michigan Street
Indianapolis, Indiana 46222

## ARTICLE 6

## Provisions for Regulation of Business and Conduct of Affairs of the Corporation

**Section 6.01. Management of Corporation.** The affairs of the Corporation shall be managed by the Board of Directors of the Corporation.

**Section 6.02. Code of By-Laws.** The Board of Directors of the Corporation shall have the power to make, alter, amend or repeal the Code of By-Laws of the Corporation as provided therein.

**Section 6.03. Limitation on Powers of the Board of Directors.** Notwithstanding any contrary provisions in these Articles, neither the members nor the Board of Directors shall have the power or authority to take or authorize any action which shall deprive the Corporation of its status as an exempt organization under the provisions of Section 501(c)(3) of the Code.

**Section 6.04. Amendment of Articles of Incorporation.** The Corporation reserves the right to amend, alter, change or repeal any provisions contained in the Articles of Incorporation or in any amendment hereto, in any manner now or hereafter prescribed or permitted by the Act

or any amendment thereto; provided, however, that such power of amendment shall not authorize any amendment which would have the effect of disqualifying the Corporation as an exempt organization under the provisions of Section 501(c)(3) of the Code.

## ARTICLE 7

## Dissolution

**Section 7.01. Dissolution.** In the event of dissolution of the Corporation, assets remaining after payment of all debts of the Corporation shall be transferred by the Board of Directors as follows:

(1) any remaining funds originally received from the Indiana Department of Education or any Indiana public school corporation shall be returned to the Indiana Department of Education or to the Indiana public school corporation from which the funds originated, to be used for exclusively public purposes; and

(2) all other assets shall be distributed to the United States, the State of Indiana, the municipality in which the registered office of the Corporation is located, or any instrumentality or subdivision thereof, or to any nonprofit corporation, trust, foundation or other organization that is organized for nonprofit educational purposes and which, at the time of transfer, is exempt from Federal income taxation under Section 501(c)(3) of the Code, as may be selected by the Board of Directors; provided, however, that any transfer to a governmental entity shall be used for exclusively public purposes.

Any such assets not so transferred by the Board of Directors shall be disposed of by the Circuit Court of the County in which the registered office of the Corporation is located, exclusively for such tax-exempt purposes or to such tax-exempt organizations as the Court shall determine. No member (other than a member that is exempt from Federal income taxation under Section 501(c)(3)), Director or Officer of the Corporation, or any private individual, shall be entitled to share in the distribution of any of the assets of the Corporation on dissolution of the Corporation.

## ARTICLE 8

## Restrictions Applicable if the Corporation Is Or Becomes A Private Foundation

**Section 8.01. Restrictions.** Notwithstanding anything contained in the Articles of Incorporation to the contrary, in the event and if for any reason the Corporation should fail to qualify as a "public charity" and is classified as a "private foundation" as that term is defined in Section 509(a) of the Code, then and in such event and in order to comply with Section 508(e) of the Code, and for so long as the Corporation may be deemed to be a "private foundation," the powers and activities of the Corporation in accomplishing the foregoing purposes shall be specifically subject to the following requirements, restrictions and limitations:

**Clause 8.01(a). Self Dealing.** The Corporation shall not engage in any act of self-dealing as defined in Section 4941(d) of the Code;

**Clause 8.01(b). Mandatory Distributions.** 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 Code;

**Clause 8.01(c). Excess Business Holdings.** The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Code;

**Clause 8.01(d). Jeopardizing Investments.** The Corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Code; and

**Clause 8.01(e). Taxable Expenditures.** The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Code.

## ARTICLE 9

## Indemnification

**Section 9.01. Scope of Indemnity.** The Corporation shall indemnify every person who is or was a director or officer of the Corporation (each of which, together with such person's heirs, estate, executors, administrators and personal representatives, is hereinafter referred to as an "Indemnitee") against all liability to the fullest extent permitted by Indiana Code 23-17-16; provided, that such person is determined in the manner specified by Indiana Code 23-17-16 to have met the standard of conduct specified in Indiana Code 23-17-16. The Corporation shall, to

the fullest extent permitted by Indiana Code 23-17-16, pay for or reimburse the reasonable expenses incurred by every Indemnitee who is a party to a proceeding in advance of final disposition of the proceeding, in the manner specified by Indiana Code 23-17-16. The foregoing indemnification and advance of expenses for each Indemnitee shall apply to service in the Indemnitee's official capacity with the Corporation, and to service at the Corporation's request, while also acting in an official capacity with the Corporation, as a director, officer, partner, member, manager, trustee, employee, or agent of another foreign or domestic corporation, partnership, limited liability company, joint venture, trust, employee benefit plan, or other enterprise, whether for profit or not.

**Section 9.02. Binding Nature.** The provisions of this Article shall be binding upon any successor to the Corporation so that each Indemnitee shall be in the same position with respect to any resulting, surviving, or succeeding entity as the Indemnitee would have been had the separate legal existence of the Corporation continued; provided, that unless expressly provided or agreed otherwise, this sentence shall be applicable only to an Indemnitee acting in an official capacity or in another capacity described in Section 9.01 prior to termination of the separate legal existence of the Corporation. The foregoing provisions shall be deemed to create a contract right for the benefit of every Indemnitee if (a) any act or omission complained of in a proceeding against the Indemnitee, (b) any portion of a proceeding, or (c) any determination or assessment of liability, occurs while this Article is in effect.

**Section 9.03. Interpretation.** All references in this Article to Indiana Code 23-17-16 shall be deemed to include any amendment or successor thereto. When a word or phrase used in this paragraph is defined in Indiana Code 23-17-16, such word or phrase shall have the same meaning in this Article that it has in Indiana Code 23-17-16. Nothing contained in this Article shall limit or preclude the exercise of any right relating to indemnification or advance of expenses to any Indemnitee or the ability of the Corporation to otherwise indemnify or advance expenses to any Indemnitee.

**Section 9.04. Severability.** If any word, clause, or sentence of the foregoing provisions regarding indemnification or advancement of expenses shall be held invalid as contrary to law or

public policy, it shall be severable and the provisions remaining shall not be otherwise affected. If any court holds any word, clause, or sentence of this paragraph invalid, the court is authorized and empowered to rewrite these provisions to achieve their purpose to the extent possible.

## ARTICLE 10

## Definitions

**Section 10.01. Definitions.** Any reference made herein to a Section of the "Code" shall include that Section of the Internal Revenue Code of 1986, as well as (1) any subsequent amendments thereto; (2) the corresponding provisions in any recodification of the Internal Revenue Code; and (3) the Treasury Regulations promulgated under such Section.

IN WITNESS WHEREOF, the undersigned, being the Incorporators designated in Article 5, execute these Articles of Incorporation this 17th day of December, 2003.

SIGNATURE ON FILE
James M. McClelland, Incorporator

SIGNATURE ON FILE
C. Perry Griffith, Jr., Incorporator

INDS01 EWW 622372v4

PBC

# CODE OF BY-LAWS

# OF

# GOODWILL EDUCATION INITIATIVES, INC.

*Adopted March 1, 2004*

## ARTICLE 1

## Identification

**Section 1.01. Name.** The name of the Corporation is **Goodwill Education Initiatives, Inc.** (the "Corporation").

**Section 1.02. Mission Statement.** The Corporation shall develop and operate one or more charter schools to prepare young people for productive lives. Each school shall be a "charter school," as that term is defined in I.C. Section 20-5.5, and shall be run in accordance with a "charter school agreement" entered into by the Corporation and the Mayor of the City of Indianapolis or other sponsor as that term is defined in I.C. Section 20-5.5-1-15 (hereinafter, the "Charter"). The schools will strengthen communities by helping urban students achieve their fullest potential by educating "one student at a time" and providing schools that (i) foster students' individual interests; (ii) engage them with teachers, parents and mentors to create learning plans that focus on those interests; and (iii) combine school based study with outside experience.

**Section 1.03. Non-Discrimination.** The Corporation shall admit students of any race, color, gender, national and ethnic origin, religion or ancestry and without regard to disability to all the rights, privileges, programs and activities generally accorded or made available at its charter schools. The Corporation shall not discriminate on the basis of disability, race, color, gender, national and ethnic origin, religion or ancestry in the administration of its educational policies, admissions, policies, scholarships and loan programs, and athletic or other school administered programs.

**Section 1.04. Non-Sectarian.** The Corporation shall be non-sectarian and non-religious in its curriculum, programs, admission policies, employment practices, governance and all other operations.

## ARTICLE 2

## Membership

**Section 2.01. Qualification of Member.** The Corporation's sole member shall be Goodwill Industries of Central Indiana, Inc. ("Goodwill"). If Goodwill ceases to exist for any reason, then the sole member shall be Goodwill's successor-in-interest, if any, or if none or if for any reason there is no member then acting, the member shall be an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, that is selected by the Board of Directors.

**Section 2.02. Rights of the Member.** The right of the member to vote and all the member's right, title and interest in or to the Corporation shall cease on the termination of membership. No member (other than a member that is then exempt from federal income tax under Code Section 501(c)(3)) shall be entitled to share in the distribution of the corporate assets upon the dissolution of the Corporation.

**Section 2.03. Dues and Assessments.** The member shall not pay dues.

**Section 2.04. Resignation from Membership.** The member may resign at any time by giving written notice of such resignation to the Chairman or the Secretary of the Corporation. Such resignation shall be made in writing and shall take effect at the time specified therein, or if no time is specified, at the time of its receipt by the Chairman or the Secretary. The acceptance of a resignation shall not be necessary to make it effective.

**Section 2.05. Termination of Membership.** The Board of Directors may not terminate or suspend the membership of the member.

**Section 2.06. Period of Membership.** The term of membership of the member shall be perpetual.

**Section 2.07. Place of Members' Meetings.** All meetings of the member shall be held either at the registered office of the Corporation in the State of Indiana, or at such other place within or without the State of Indiana as may be designated by the Board of Directors and specified in the respective notices or waivers of notice thereof.

**Section 2.08. Annual Meeting.** An annual meeting of the member shall be held within six (6) months after the close of the fiscal year of the Corporation as designated by the Board of Directors and specified in the respective notices or waivers of notice thereof.

**Section 2.09. Special Meetings.** Special meetings of the member may be called by the Chairman of the Corporation or by the Board of Directors.

**Section 2.10. Notice of Meetings.** A written or printed notice stating the place, day and hour of the meeting and, in case of a special meeting, the purpose or purposes for which the meeting is called, shall be delivered or mailed by the Secretary or by the officer or persons calling the meeting to the member at such address as appears on the records of the Corporation at least ten (10) days before the date of the meeting, or if notice is mailed by other than first class or registered mail, thirty (30) to sixty (60) days before the meeting date. Notice of any meeting of the member may be waived in a writing signed by the member and delivered to the Corporation. Attendance at any meeting shall constitute a waiver of notice of that meeting.

**Section 2.11. Action Without Meeting.** Any action required or permitted to be taken at a meeting of the member of the Corporation may be taken without a meeting if a consent in writing, setting forth the action so taken, shall be signed by a duly authorized representative of the member, and such written consent is filed with the minutes of the proceedings of the member. Such consent shall have the same effect as the vote of the member at a duly held meeting.

## ARTICLE 3

## Board of Directors

**Section 3.01. Functions.** The business, property and affairs of the Corporation shall be managed and controlled by a Board of Directors as from time to time constituted.

**Section 3.02. Number and Qualification.** There shall be nine (9) voting Directors of the Corporation, which number may from time to time be increased or decreased by resolution adopted by not less than a majority of the Board of Directors, subject to the limitation that the Board shall never be reduced to less than three (3) nor increased to more than eleven (11) Directors. Except as otherwise provided in these By-Laws, all members of the Board of Directors shall have and be subject to the same and equal qualifications, rights, privileges, duties, limitations and restrictions; provided, however, the President of the Corporation shall be an ex-officio member of the Board of Directors but shall not vote, and shall not be counted as a Director for purposes of quorums, majority voting, and similar issues. All Directors shall consent to appropriate background searches as required by Charter Section 3.2. No Director shall take office until the Corporation fully complies with the provisions of Charter Section 3.2.

**Section 3.03. Election.** One-half (rounded down to the nearest whole number) plus one of the members of the Board of Directors (the "Appointed Directors") shall be appointed by Goodwill. The remaining members of the Board of Directors shall be elected by the Board of Directors at the annual meeting provided in this Article 2 of this Code of By-Laws (the "Elected Directors").

**Section 3.04. Term.** The Elected Directors shall be divided into three classes as nearly equal in number as possible. The terms of Elected Directors in the first group expire at the first annual meeting of the Directors after their election, the terms of the second group expire at the second annual meeting of the Directors after their election, and the terms of the third group expire at the third annual meeting of the Directors after their election. At each annual meeting of the Directors held thereafter, Directors shall be chosen for a term of three (3) years to succeed those whose term expires. Incumbent Directors shall be eligible for re-election or re-appointment; provided, however, no person may serve as a Director for more than three (3) consecutive three (3) year terms.

**Section 3.05. Vacancies.** Any vacancy among the Elected Directors caused by death, resignation, removal or otherwise may be filled by the remaining Board of Directors, or if the Directors remaining in office constitute fewer than a quorum, by the affirmative vote of a majority of the Directors remaining in office. Any vacancy among the Appointed Directors shall

be filled by Goodwill. A Director elected to fill a vacancy shall hold office until the expiration of the term of the Director causing the vacancy and until a successor shall be elected and qualified.

**Section 3.06. Resignation.** Any Director may resign at any time by giving written notice of such resignation to the Board of Directors, the Chairman, President or Secretary of the Corporation, and if an Appointed Director, to Goodwill. A resignation is effective upon delivery unless the notice specifies a later effective date The acceptance of a resignation shall not be necessary to make it effective.

**Section 3.07. Removal.** Any Director may be removed, with or without cause, in accordance with the provisions of the Indiana Nonprofit Corporation Act of 1991, as amended (the "Act").

**Section 3.08. Meetings.** The Board of Directors shall meet at least quarterly. All meetings shall occur either at the registered office of the Corporation in the State of Indiana, or at such other place within the State of Indiana as may be designated by the Board of Directors and specified in the respective notices or waivers of notice thereof. The annual meeting shall be for the purpose of organization, election of directors and officers and consideration of any other business that may properly be brought before the meeting and shall be held within six (6) months after the close of the fiscal year of the Corporation as designated by the Board of Directors and specified in the respective notices or waivers of notice thereof. If the annual meeting is not held as above provided, the election of officers may be held at any subsequent meeting of the Board of Directors specifically called in the manner set forth herein. The Board of Directors may provide by resolution the time and place within the State of Indiana, for the holding of additional regular meetings of the Board without other notice than such resolution. Special meetings of the Board of Directors may be called by the Chairman, and shall be called by order thereof upon the written request of at least two Directors, which request shall set forth the business to be conducted at such meeting.

**Section 3.09. Notice of Meetings.** Notice of all meetings of the Board of Directors, except as herein otherwise provided, shall be given by mailing the same (whether by post or by electronic mail), by telephoning, or delivering personally the same at least two (2)

days before the meeting to the usual business or residence address of the Director as shown upon the records of the Corporation. Notice of any meeting of the Board of Directors may be waived in a document filed with the Secretary by any Director if the waiver sets forth in reasonable detail the purpose or purposes for which the meeting is called and the time and place of the meeting. Attendance at any meeting of the Board of Directors shall constitute a waiver of notice of that meeting, except where a Director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. In addition, notice of any Board meeting shall be posted in a conspicuous place at the principal office of the Corporation or at the Board's meeting place at least 48 hours (excluding Saturday, Sunday, and legal holidays) prior to the meeting. Notice of any meeting shall at all times conform with the requirements of Indiana's "Open Door Law," I.C. Section 5-14-1.5.

**Section 3.10. Quorum.** A quorum of the Board of Directors at any annual, regular or special meeting of the Board of Directors shall be a majority of the duly qualified members of the Board of Directors then occupying office, but in no case shall there be less than two (2) Directors present. The act of a majority of the Directors present at a meeting who constitute a quorum shall be the act of the Board of Directors.

**Section 3.11. Committees.** The Board of Directors, by resolution adopted by a majority of the Board, may designate one or more committees, each of which shall consist of two or more Directors, which committees, to the extent provided in said resolution, shall have and exercise the authority of the Board of Directors in the management of the Corporation. Other committees not having and exercising the authority of the Board of Directors in the management of the Corporation may be designated by a resolution adopted by a majority of the Directors present at the meeting at which a quorum is present. The designation of any such committee and the delegation thereof of authority shall not operate to relieve the Board of Directors, or any individual Director, of any responsibility imposed by law. All committee meetings shall be run in accordance with the requirements of Indiana's "Open Door Law," I.C. Section 5-14-1.5.

**Section 3.12. No Actions Without Meeting.** All actions required or permitted to be taken at any meeting of the Board of Directors or of any committee thereof must be taken

at a meeting of the Board of Directors held in accordance with the requirements of Indiana's "Open Door Law," I.C. Section 5-14-1.5.

**Section 3.13. Meeting by Telephone, etc.** Any or all of the members of the Board or of any committee designated by the Board may participate in a meeting by or through the use of any means of communication by which all persons participating may simultaneously communicate with each other during the meeting. Participation in a meeting using these means constitutes presence in person at the meeting. Meetings at which one or more individuals participate by phone shall be treated in all respects as a meeting at which such individuals are physically present for purposes of complying with the requirements of Indiana's "Open Door Law," I.C. Section 5-14-1.5.

## ARTICLE 4

## Officers

**Section 4.01. Officers and Agents.** The officers of the Corporation shall consist of a Chairperson, a Vice-Chairperson, a President, a Secretary, and such other officers as the Board of Directors may, by resolution, designate from time to time. Any two (2) or more offices may be held by the same person. The Board of Directors may, by resolution, create, appoint and define the duties and fix the compensation of such officers and agents as, in its discretion, is deemed necessary, convenient or expedient for carrying out the purposes for which the Corporation is formed; provided, however, that officers and agents shall be compensated, if at all, only for actual services performed on behalf of the Corporation.

**Section 4.02. Election, Term of Office and Qualification.** All officers shall be chosen annually by the Board of Directors at the annual meeting of the Board of Directors. Each officer shall hold office (unless the officer resigns, is removed, or dies) until the next annual meeting of the Board of Directors or until a successor is chosen and qualified.

**Section 4.03. Vacancies.** In the event an office of the Corporation becomes vacant by death, resignation, retirement, disqualification or any other cause, the Board of Directors shall elect a person to fill such vacancy, and the person so elected shall hold office and

serve until the next annual meeting of the Board of Directors or until a successor is elected and qualified, or until the officer's death, resignation or removal.

**Section 4.04. Chairperson.** The Chairperson, if present, shall preside at all meetings of the Board of Directors, shall appoint the chairperson and members of all standing and temporary committees, subject to the review of the Board of Directors, and shall do and perform such other duties as this Code of By-Laws provides or as may be assigned by the Board of Directors.

**Section 4.05. Vice-Chairperson.** The Vice-Chairperson shall preside at all meetings of the Board of Directors if the Chairperson is not present and shall do and perform such other duties as this Code of By-Laws provides or as may be assigned by the Board of Directors.

**Section 4.06. President.** The President shall be the chief executive officer of the Corporation; shall have and exercise general charge and supervision of the affairs of the Corporation; and shall do and perform such other duties as this Code of By-Laws provides or as may be assigned by the Board of Directors. The president shall be an ex-officio member of the Board of Directors, but shall not have a vote.

**Section 4.07. Secretary.** The Secretary shall have the custody and care of the corporate records and the minutes book of the Corporation. The Secretary shall attend all the meetings of the Board of Directors of the Corporation, and shall keep, or cause to be kept in a book provided for the purpose, a true and complete record of the proceedings of such meetings, and shall perform a like duty for all standing committees of the Board of Directors when required. The Secretary shall attend to the giving and serving of all notices of the Corporation, shall file and take care of all papers and documents belonging to the Corporation, shall authenticate records of the Corporation as necessary, and shall perform such other duties as may be required by the Code of By-Laws or as may be prescribed by the Board of Directors. The Secretary shall prepared and maintain all the materials necessary to comply with the provisions of Indiana's "Open Door Law," I.C. Section 5-14-1.5.

**Section 4.08. Assistant Officers.** The Board of Directors may from time to time designate assistant officers who shall exercise and perform such powers and duties as the officers whom they are elected to assist shall specify and delegate to them, and such other powers and duties as may be prescribed by the Code of By-Laws, the Board of Directors.

**Section 4.09. Removal.** Any officer may be removed from office, with or without cause, by the Board of Directors.

**Section 4.10. Resignations.** Any officer may resign at any time by delivering notice to the Board of Directors, the President or the Secretary. A resignation is effective upon delivery unless the notice specifies a later effective date.

## ARTICLE 5

## Loans to Officers and Directors

The Corporation shall not lend money to or guarantee the obligations of any officer or Director of the Corporation.

## ARTICLE 6

## Financial Affairs

**Section 6.01. Contracts.** The Board of Directors may authorize any officer or agent to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to a specific instance; and unless so authorized by the Board of Directors, no officer, agent or employee shall have any power or authority to bind the Corporation by any contract or engagement, or to pledge its credit or render it liable pecuniarily for any purpose or to any amount. The Board is specifically authorized to enter into (and from time to time amend) one or more "Charter School Agreements" with the Mayor of the Consolidated City of Indianapolis, Marion County, Indiana or any other qualified sponsor.

**Section 6.02. Checks, etc.** The Board shall by resolution designate officers, agents or employees of the Corporation who may, in the name of the Corporation, execute drafts,

checks and orders for the payment of money in its behalf; provided, however, that any expenditure in excess of Twenty-Five Thousand Dollars ($25,000.00) that is outside the ordinary course of operation shall comply with Section 10.6 of the Charter.

**Section 6.03. Investments.** The Corporation shall have the right to retain all or any part of any securities or property acquired by it in whatever manner, and to invest and reinvest any funds held by it, according to the judgment of the Board of Directors.

**Section 6.04. Audited Financial Statements.** The Corporation shall maintain financial statements prepared in accordance with the unified accounting system prescribed by the State Board of Education and State Board of Accountants and shall engage an independent certified public accountant to audit such financial statements.

## ARTICLE 7

## Fiscal Year

The fiscal year of the Corporation shall begin on the first day of July of each year and end on the last day of June of each year.

## ARTICLE 8

## Prohibited Activities

Notwithstanding any other provision of this Code of By-Laws, no member, Director, officer, employee or agent of this Corporation shall take any action or carry on any activity by or on behalf of the Corporation not permitted to be taken or carried on by an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or any successor provision or provisions thereto.

## ARTICLE 9

## Amendments

The power to make, alter, amend or repeal the Code of By-Laws is vested in the Board of Directors, which power shall be exercised by affirmative vote of a majority of the Directors;

provided, however, that no amendment to Article 2 may be made without the prior approval of Goodwill. Any proposed amendment shall be included in the notice of such meeting and each member shall be provided with a copy of the notice of such meeting. If notice of a proposed amendment to the Code of By-Laws is included in the notice of any meeting of the Board of Directors, it shall be in order to consider and adopt at that meeting any amendment to the Code of By-Laws dealing with the subject matter with which the proposed amendment is concerned.

**GOODWILL EDUCATION INITIATIVES, INC.**
Levels of Approval for Purchases

**Note:** By resolution adopted ____, the Board shall approve all budgeted expenditures that fall within 10% of GEI's annual budget, in lieu of specific approval of individual expenditures. However, all GEI expenditures, including those for business support services provided by Goodwill Industries of Central Indiana, Inc. may be subject to the express approval of GEI's Board of Directors.

**Unbudgeted Capital Purchases** (Purchases over $1,500 for land, buildings, building improvements, equipment, equipment repairs)

| | | |
|---|---|---|
| over $1,500 | President | Jim McClelland |

**Long-Term Leases**

| | | |
|---|---|---|
| over 1 year | President<br>Treasurer | Jim McClelland<br>Dan Riley |

**Other Purchases** (Budgeted expense items, excluding leases)

| | | |
|---|---|---|
| up to $250 | Learning Through Internships Coordinator | TBD |
| up to $500 | Advisors | TBD |
| up to $1,000 | School Directors | Carol Myers<br>Robert Moses |
| up to $5,000 | Chief Administrative Officer | Carolyn McCutcheon |
| up to $10,000 | President<br>Treasurer | Jim McClelland<br>Dan Riley |
| over $10,000 | Board of Directors | |

Charter Implementation Team Meeting
March 23, 2004
Agenda

**Upcoming Dates:**
IDOE New Charter School Conference, April 20 - 21

Student and Parent open houses and interviews, May 4 – 8

Lottery to select students, June 1 if we have more than 120 applications

**Reports on Progress by Area**

| | |
|---|---|
| Marketing | Cindy/Staff |
| Information Technology | Scott/Staff |
| EOD/HR | Heather |
| Facility/Space | George/Staff |
| Fiscal | Dan |
| **Project Plan Update** | **Jerry** |

Items for follow up from 3/9/04 meeting
Procurement process – Dan Riley, Scott Bess, Wesley Simms

Student recruitment – important dates – Tiffany Raidy

**Dependencies or follow up questions** **All**
**Next meeting – 4/6/04, 10:30**

**GOODWILL OF CENTRAL & SOUTHERN INDIANA, INC.**
**GOODWILL FOUNDATION OF CENTRAL & SOUTHERN INDIANA, INC.**
**GW COMMERCIAL SERVICES, INC.**
**GOODWILL EDUCATION INITIATIVES, INC.**
**(Collectively "Goodwill")**

# POLICY ON CONFLICTS OF INTEREST

The guiding principle of Goodwill's policy on conflicts of interest is that all employees and volunteers, including officers and members of the Boards of Directors, working for or on behalf of Goodwill must avoid situations in which their personal interests may conflict, or appear to conflict, with the interests of Goodwill. All persons employed by Goodwill and volunteers working on Goodwill's behalf shall be governed by the following:

All existing pertinent civil laws must be obeyed in letter and spirit.

All Goodwill policies must be followed.

Where no law or policy exists, high standards of ethical conduct are expected.

Conflicts of interest may be difficult to detect or define. Sometimes there is only a degree of difference between an acceptable and an unacceptable activity. It is important that all persons associated with Goodwill avoid obvious conflicts of interest and any situation which may give the appearance of one.

## PURCHASING POLICY

Goodwill has a primary responsibility to be a good steward of its resources. This includes a responsibility to use public, earned and/or donated funds in a manner that will yield the greatest benefits to Goodwill to further the mission of the organization. Purchasing decisions and contract awards must be made with this primary responsibility uppermost in mind. Goodwill will not make such decisions based on other criteria which would, in Goodwill's opinion, result in less than optimal value received by the organization.

## BUSINESS RELATIONSHIPS WITH MEMBERS OF BOARDS OF DIRECTORS

There may be some situations in which Goodwill's interests are best served by doing business with members of one of Goodwill's boards or entities in which they have substantial interest or control. Some of these relationships may occur from time to time throughout the year with transactions typically involving less than $500 each. All such relationships which regularly occur or are likely to occur shall be listed for review and approval of the Board at least once each year.

Any proposed business relationship between Goodwill and a member of one of its Boards of Directors or an entity in which a Goodwill Director has substantial interest or control which involves more than $500 must be disclosed, reviewed, and approved in advance by the respective Goodwill entity board of directors.

**OTHER CONFLICT OF INTEREST POLICIES WHICH APPLY TO EMPLOYEES**

Employees shall select and deal with suppliers, customers, and other persons doing or seeking to do business with Goodwill in a completely impartial manner without favor or preference based upon any considerations other than the best interests of Goodwill.

Employees shall not seek nor accept -- directly or indirectly -- any payments, fees, loans, or services from any person or business entity that does or seeks to do business with Goodwill or is in competition with Goodwill. However, this does not prohibit employees from borrowing money from a financial institution at normal and customary rates of interest and terms.

Employees shall not seek nor accept for themselves or for members of their families any gifts, entertainment, or favors, the total of which would have more than nominal value (defined as $100 or more per event), from any person or business entity that does or seeks to do business with Goodwill or from any donor or person from whom Goodwill is seeking current or future charitable gifts. Meals at which business is discussed are considered normal business activities and may be purchased by a business or individual interested in or presently doing business with Goodwill. This policy recognizes that Goodwill's employees may occasionally attend sporting and other entertainment events with persons or business entities where the cost of the event exceeds $100. In such cases, Goodwill employees shall use sound judgment in attending such events, and shall limit such instances to organizations and individuals with whom Goodwill has an existing business relationship.

Any gift, entertainment, or favor of more than nominal value must be reported to Goodwill's President and the gift returned to its source or donated to Goodwill. If donated, a letter must be sent to the person who made the gift to make them aware Goodwill was the beneficiary and not any individual employed by Goodwill.

Goodwill employees will not give gifts, favors, or entertainment of greater than nominal value to any person or entity which does or seeks to do business with Goodwill.

Except when fully disclosed and specifically approved in advance by Goodwill, employees may not own -- directly or indirectly -- a significant interest in any business that does or seeks to do business with or is in competition with Goodwill. If such a situation arises, the employee shall not be involved in Goodwill's management or decision making process relating to the employee's business interest. Where this is not possible, the employee shall divest himself/herself of said business interest until Goodwill ceases its work with or is no longer in competition with said interest.

Ownership or involvement in such a business shall be deemed as significant if the total interest of the employee and/or family members represents:

a. More than 5% of the outstanding assets of the firm.

b. More than 5% of the total assets of the employee and family members.

Members of the family include the employee's spouse, children, parents, brothers, and sisters.

Unless specifically approved in advance by Goodwill, employees shall not, on behalf of Goodwill, conduct business with a relative or business entity in which the employee or relative is associated. When authorized, such dealings must be fully disclosed to Goodwill.

This policy shall not prohibit relatives of Goodwill employees from purchasing goods in Goodwill stores. However, such sales must not be rung up by an employee who is a relative of those making the purchases, and all other applicable retail policies will apply to such transactions.

Employees have the continuing duty to report to the President any personal ownership, interest, or other relationship which might affect their ability to exercise impartial and ethical judgments in their areas of responsibility.

Failure to report or enforce any of the above may result in the employee's termination from employment at Goodwill.

## CONFIDENTIAL AND PROPRIETARY INFORMATION

Every employee and volunteer who is in an official capacity (e.g. member of board of directors) has a responsibility to ensure that any information gained as a result of his/her involvement with Goodwill is not improperly disclosed.

Confidential or proprietary information is defined as any information belonging to Goodwill, its Board, or employees which could be used by others for their own advantage to the potential detriment of Goodwill or its employees or which would violate the confidence of an individual. Examples include, but are not limited to the following:

> Information concerning Goodwill's business plans or internal operations which could be used by competitors to Goodwill's detriment.
>
> Information which is not already public concerning contributions made by any individual or corporate entity to Goodwill.
>
> Personal information which is not already public concerning any individual employed or served by Goodwill.

Persons terminating their involvement with Goodwill who possess materials containing confidential information about the organization shall destroy it or return it to Goodwill and shall not use it for any other purpose.

## POLITICAL CONTRIBUTIONS AND ACTIVITIES

All persons associated with Goodwill as employees or volunteers, while exercising their individual political freedoms and prerogatives, must remain sensitive to the need for Goodwill to be non-partisan and to be perceived as such by the public.

Goodwill will not use any of its funds to support any political party or candidate for public office.

This updated policy is approved by the Board of Directors this **9th day of September, 2008, and amended as necessary. Reviewed and updated January, 2016.**

I hereby acknowledge that I have read, understand and shall abide by the policy stated above.

Signature_____

Printed name _____

Date _____

I wish to disclose the following potential or actual conflict of interest:

_____
_____
_____
_____
_____
_____

Signature _____

Printed Name _____

Date _____

**Attachment 13 – Statement of Assurances**

Exhibit E

## Statement of Assurances

The charter school agrees to comply with all of the following provisions: *(Read and check)*

☑ 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.

☑ 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.

☑ 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by the ICSB and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.

☑ 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.

☑ 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.

☑ 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.

☑ 7. Recipients will comply with all provisions of the *Elementary and Secondary Education Act of 1965, as amended by the Every Student Succeeds Act of 2015 ("ESSA")*, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act ("FERPA") and assessments.

☑ 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.

☑ 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.

☑ 10. Recipients will indemnify and hold harmless the ICSB, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees,

and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

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

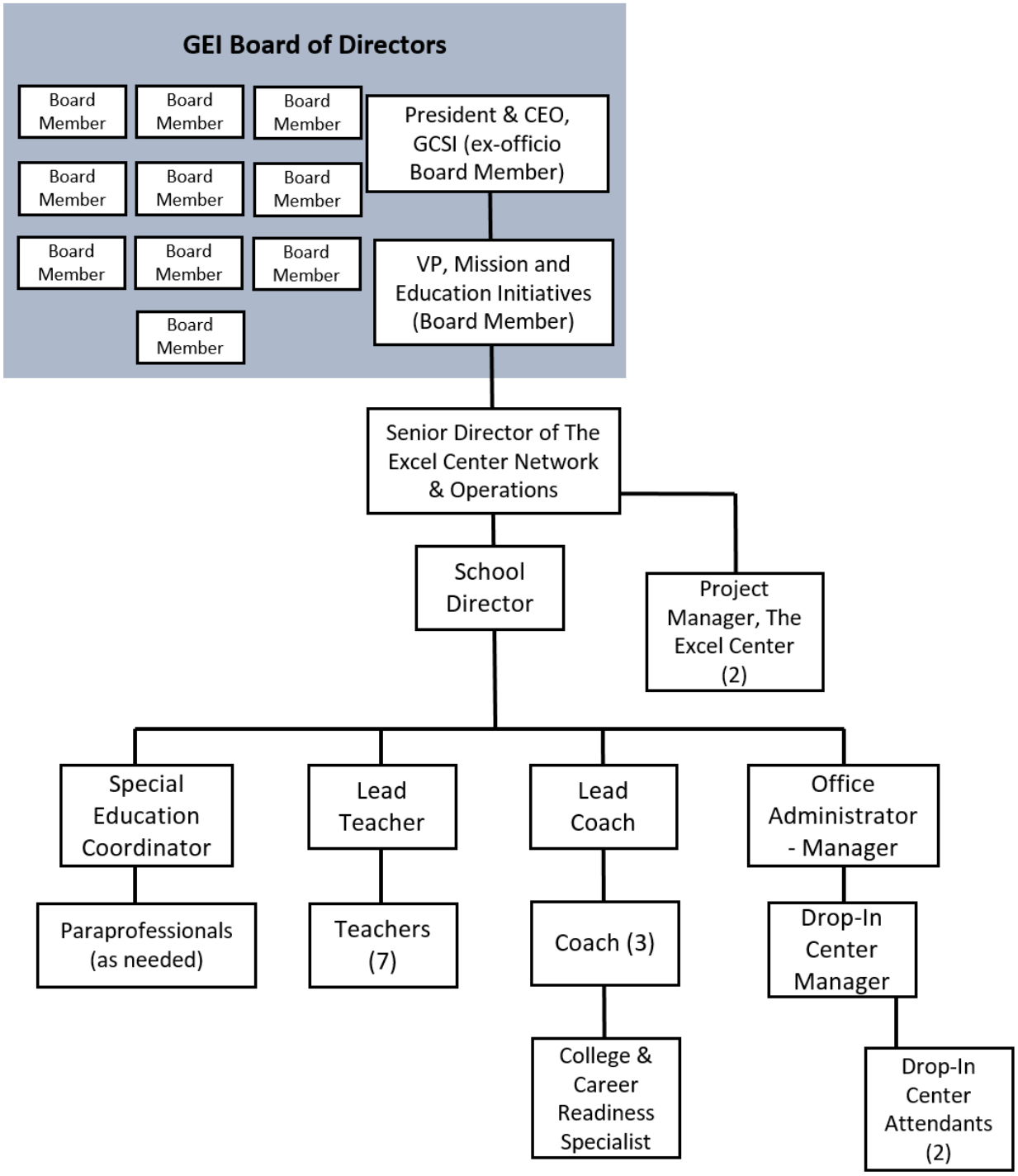
**Signature from Authorized Representative of the Charter School Applicant**

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

| **PRINT NAME & TITLE** | **DATE** |
|---|---|
| Betsy Delgado, Vice President | |
| **SIGN NAME** Betsy Delgado | 3/20/17 |

**Attachment 14 – Organizational Chart**

**School-Level Organizational Chart**



High-Level Organizational Chart

# GCSI - Executive Team

**Kent Kramer**
President & CEO

**Kim Myers**
Executive Assistant to CEO

## Business Operations

**Eric Schlegel**
VP,
Retail Operations

**Jim Humphrey**
VP,
Commercial Services

## Organizational Support

**Dan Riley**
Senior VP,
Administration and CFO

**Jay Lytle**
VP and
Chief Information Officer

**Cindy Graham**
VP,
Marketing

**Zaida Monell**
VP,
Employee & Organization
Development

## Education, Mission Advancement & Community Engagement

**Betsy Delgado**
VP,
Mission and Education
Initiatives

**Kyle Lanham**
VP,
Community Engagement
Chief Advancement Officer

High-Level Organizational Chart

# Goodwill Education Initiatives & Indiana Network of Independent Schools

**Betsy Delgado**
VP,
Mission and
Education Initiatives

**Anne Davis**
Senior Director, Education Initiatives

**Bethany Frost**
Manager, GEI
Reporting & Records

**Jonathan Gates**
Principal

**Stacy Haskins**
Scheduling and
Support Coordinator

**Tanisha Adams**
Manager, Registrar

**Heather Roth**
Outreach, Enrollment and
Records Coordinator

**Jeanita Jordan**
Records Office,
Administrative Assistant

**Brittany Woods**
Records Office,
Administrative Assistant

**Melissa Rodriguez**
Records Office,
Administrative Assistant

**Registrar**
Amanda Schwartz
Cammy Betts
Cheryl Funches

**Tonya Taylor**
Director,
Special Education

**Courtney Kontor**
Speech and Language
Pathologist

**Laura Cope**
Special Education Assistant
Director

**Special Education Compliance Monitor**
Karen Palmer
Stephanie Williams

**Jeffrey Lozer**
Senior Director,
INIS

**Kimberly Reier**
Network Development
and Advancement
Director

**Dan Scott**
Director,
Data Services

**Brian Collins**
Support Manager,
Data Services

**Joelle Clemons**
Project Manager –
Data Services

**Jeffery Hoover**
Senior Director, The Excel Center
Network and Operations

**Director, The Excel Center**
Brandon Marks, Anderson
Christopher Locke, Clarkesville
Corey Emery, Franklin Rd.
Danielle White, Lafayette
Dionne Leard, University Heights
Gregory Pryor, Michigan St.
Katherine Morgan, West
Keeanna Warren, Meadows
Khalilah Palmer, Shelbyville
Steven Dillon, Noblesville
Thomas Pengelly, Kokomo
Tyler Stewart, Richmond

**Daniel Stevens**
Chief of
School Operations

**Debra Daniels**
Manager, JAG

**Markous Jewett**
National Office - School
Development Director

High-Level Organizational Chart

# Accounting Team

**Dan Riley**
Senior VP,
Administration and CFO

**Jeffrey Curiel**
Director, GEI Financial Operations

**Tamara Chaney**
Director,
INIS Accounting Services

**Deanna Addison**
INIS Senior Accountant

**Lydia Norby**
INIS Staff Accountant

**Mary Thomas**
INIS Staff Accountant

**Gina Coleman**
Assistant Controller, GEI

**Erica Tormoehlen**
Manager, GEI Accounting

**Andrea Ladewski**
GEI Accounting Clerk

**Patricia Barnes**
Manager, GEI Payroll

**Cynthia Sum**
INIS Payroll Consultant

**David Stewart**
Corporate Controller

**Kim Pardue**
Director, Payroll

**Anna Scott**
Manager, Payroll

**Donna Franklin**
Employee Records Specialist

**Pamela Cupka**
Payroll Specialist

**Natalie Nagel**
Assistant Controller

**Linda Spann**
Senior Financial Analyst

**Angela Spells**
Manager, Accounts Payable

**Susan Pizarek**
Accounts Payable Clerk

**Kelly Kintner**
Director, Financial Planning and Analysis

**Alexis Fisk**
Senior Grants Accountant

**Tina Kalman**
Retail Operations Analyst

**Anthony Harland-Bennett**
Senior Accountant

**Carole Wallace**
Accounting Associate

**Valerie Roe**
Senior Accounting Analyst

# Technology Solutions Team

High-Level Organizational Chart

**Jay Lytle**
VP and
Chief Information Officer

**Elizabeth Chambers**
Director, TS Project Management Office

**Joy Bosley**
Software Quality Assurance Specialist

**Muhammad Maaita**
Software Quality Assurance Analyst II

**Mansa Samlafo**
Administrative Coordinator

**Tabitha Manross**
Manager Business Intelligence and Enterprise Planning

**Katherine Prater**
Business Analyst

**Dennis Cuffel**
Senior Director, Technology Solutions

**William Clark**
TS Manager, Southern Region

**Daniel Hardin**
Technical Support Analyst I

**Daniel Whitmyer**
Manager, Infrastructure and Architecture

**Ben Frederick**
Tech Support Analyst III

**Technical Support Analyst I**
Matthew Brown
Matthew Vargo

**James Satterhwaite**
Technology Solutions Technician

**Ryan Campbell**
Technology Solutions Specialist

**Usha Marakani**
Manager, Development and Integration

**INIS**

**Eric Stewart**
Director, Instructional Technology and Information Services

**Kelsey Bauchle**
eLearning Developer

**Stanley Dixon**
Application Analyst II

**Kurt Reusze**
Project Manager-TS

**Christian Winzeler**
Technical Support Analyst II

**Attachment 15 – Projected Network Staffing**

The table, below, provides the projected staffing needs for GEI and the new 4 schools is plans to open over the next five years, through this charter application.

It should be noted that, on an annual basis, GEI will reassess and adjust its growth plans based on community demand and interest throughout GCSI's territory in central and southern Indiana. For this reason, although GEI is requesting to open four charter schools in four successive years, GEI is formally requesting the ability to open four schools within a five-year timeframe to adjust for community outreach efforts as well as any unforeseen capacity constraints, including but not limited to identifying school facilities.

| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|---|---|---|---|---|---|
| Number of elementary schools | | | | | |
| Number of middle schools | | | | | |
| Number of high schools | 1 | 2 | 3 | 4 | 4 |
| **Total schools** | **1** | **2** | **3** | **4** | **4** |
| Student enrollment | 300 | 600 | 900 | 1,200 | 1,200 |
| **Management Organization Positions** | | | | | |
| Vice President, Mission and Education Initiatives | 1 | 1 | 1 | 1 | 1 |
| Senior Director of The Excel Center Network and Operations | 1 | 1 | 1 | 1 | 1 |
| Project Manager, The Excel Center | 2 | 2 | 2 | 2 | 2 |
| Senior Director of Education Initiatives | 1 | 1 | 1 | 1 | 1 |
| Director of Financial Operations | 1 | 1 | 1 | 1 | 1 |
| Assistant Controller, GEI | 1 | 1 | 1 | 1 | 1 |
| Manager, GEI Accounting | 1 | 1 | 1 | 1 | 1 |
| Manager, GEI Payroll | 1 | 1 | 1 | 1 | 1 |
| Payroll Consultant | 1 | 1 | 1 | 1 | 1 |
| Chief of School Operations | 1 | 1 | 1 | 1 | 1 |
| Director of Special Education | 1 | 1 | 1 | 1 | 1 |
| Assistant Director of Special Education | 1 | 1 | 1 | 1 | 1 |
| Speech and Language Pathologist | 1 | 1 | 1 | 1 | 1 |
| Special Education Compliance Monitor | 2 | 2 | 2 | 2 | 2 |
| Director of Curriculum Services | 1 | 1 | 1 | 1 | 1 |
| Director of Data Services | 1 | 1 | 1 | 1 | 1 |
| Support Manager, Data Services | 1 | 2 | 2 | 2 | 2 |
| Project Manager, Data Services | 1 | 1 | 1 | 1 | 1 |
| Scheduling and Support Coordinator | 1 | 1 | 1 | 1 | 1 |
| State Reporting Specialist | 1 | 1 | 1 | 1 | 1 |
| Registrar Manager | 1 | 1 | 1 | 1 | 1 |
| Registrar | 3 | 3 | 3 | 3 | 3 |
| Enrollment Specialist | 1 | 1 | 1 | 1 | 1 |
| **Total Back-Office FTEs** | **27** | **28** | **28** | **28** | **28** |
| High School Staff | | | | | |
| School Director | 1 | 2 | 3 | 4 | 4 |

| | | | | | |
|---|---|---|---|---|---|
| Instructor | 7 | 14 | 21 | 28 | 28 |
| Lead Instructor | 1 | 2 | 3 | 4 | 4 |
| Coach | 2 | 5 | 8 | 11 | 12 |
| College and Career Readiness Specialist | 1 | 2 | 3 | 4 | 4 |
| Lead Coach | 1 | 2 | 3 | 4 | 4 |
| Manager, Office Administrator | 1 | 2 | 3 | 4 | 4 |
| Drop-In Center Manager | 1 | 2 | 3 | 4 | 4 |
| Drop-In Center Attendant | 2 | 4 | 6 | 8 | 8 |
| **Total FTEs at High Schools** | **17** | **35** | **53** | **71** | **72** |
| **Total Network FTEs** | **44** | **63** | **81** | **99** | **100** |

**Attachment 16 – Start-Up Plan**

The table, below, provides a detailed start-up plan for the period leading up to the first day of student attendance of each of the proposed Excel Centers in this charter application.

It should be noted that, on an annual basis, GEI will reassess and adjust its growth plans based on community demand and interest throughout GCSI's territory in central and southern Indiana. For this reason, although GEI is requesting to open four charter schools in four successive years, GEI is formally requesting the ability to open four schools within a five-year timeframe to adjust for community outreach efforts as well as any unforeseen capacity constraints, including but not limited to identifying school facilities.

Given the variability of school facility selection and the renovation needs of selected school facilities, the school start-up plan is subject to change and will be updated, as appropriate, for each new school opening. The school start-up plan will also be updated in order to reflect the first day of school for each school year. School calendars are determined at the end of the prior school year, after the IDOE publishes mandatory assessment testing windows.

| Area | January - March 2018 | April 2018 | May 2018 | June 2018 | July 2018 |
|---|---|---|---|---|---|
| Charter Activation | •Submit activation materials (as needed) | •ICSB issues activation decision | | | |
| Finance | | •Revise school budget | •Incorporate school into GEI's accounting system<br>•Submit projected ADM count to IDOE | | |
| Facility | •Select school facility location | •Work with architect to design school space<br>•Begin facility renovations | | •Complete facility renovations, as needed<br>•Facility sign off by all necessary parties (health department, fire marshal, etc.)<br>•Purchase furniture<br>•Set-up school building space | |

| | | | | | |
|---|---|---|---|---|---|
| **Community Engagement, Marketing & Student Recruitment** | •Develop school marketing plan | •Meet with area heads of school and superintends<br>•In-store messaging<br>•Make marketing-related purchasing, as needed (bill boards, radio spots, newspaper ads, etc.) | •Participate in local events (fairs, festivals, etc.) per the developed marketing plan<br>•Host and participate in information sharing sessions<br>•Host student enrollment fairs | •Provide school signage and other materials<br>•Participate in local events (fairs, festivals, etc.) per the developed marketing plan<br>•Host and participate in information sharing sessions<br>•Host student enrollment fairs<br>•Send student orientation reminders | •Press release regarding school opening |
| **Staffing** | •Recruit and select school leader | •School Director begins<br>•School Director training<br>•Post school staff positions<br>•Screen candidates | •Select and hire Lead Teacher, Lead Coach, and Office Administrator - Manager<br>•Continue screening staff candidates, as needed<br>•Conduct staff interviews<br>•Select and hire staff | •Continue selecting and hiring staff as needed<br>•All staff begin work<br>•New staff orientation | •Staff professional development |
| **Instruction & Assessment** | •Identify industry certifications offered at the school | | •Purchase curricular software and materials<br>•Review and transcribe student transcripts | •Review and assess needs of students with IEPs or 501 plans<br>•Review and transcribe student transcripts | •Finalize student schedules<br>•First day of school (July 17) |

| | | | | | |
|---|---|---|---|---|---|
| **Student Enrollment** | | •Launch student enrollment process<br>•Begin accepting student enrollment information | •Continue accepting student enrollment information<br>•Host student enrollment fairs | •Continue accepting student enrollment information<br>•Conduct student lottery, if demand exceeds capacity<br>•Host student enrollment fairs | •Student orientation<br>•Continue accepting student enrollment information and add students to waiting list |
| **Technology** | | •Incorporate school into the online enrollment system<br>•Incorporate school into SIS | •Set up network infrastructure<br>•Purchase hardware and software | | |

**Attachment 17 – Insurance Coverage**

GOODEDU-CL LSKINNER

ACORD

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 10/17/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Gregory & Appel Insurance
1402 N Capitol Suite 400
Indianapolis, IN 46202

CONTACT NAME:
PHONE (A/C, No, Ext): (317) 634-7491 FAX (A/C, No): (317) 634-6629
E-MAIL ADDRESS:

| INSURER(S) AFFORDING COVERAGE | NAIC # |
|---|---|
| INSURER A : Hanover Insurance Company | 36064 |
| INSURER B : | |
| INSURER C : | |
| INSURER D : | |
| INSURER E : | |
| INSURER F : | |

INSURED
Goodwill Education Initiatives
1635 West Michigan St
Indianapolis, IN 46222

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | X COMMERCIAL GENERAL LIABILITY | | | | | | EACH OCCURRENCE | $ 1,000,000 |
| | CLAIMS-MADE X OCCUR | | | ZHW5909488 | 07/15/2014 | 07/15/2015 | DAMAGE TO RENTED PREMISES (Ea occurrence) | $ 500,000 |
| | X Sexual Mol/Miscon | | | | | | MED EXP (Any one person) | $ 15,000 |
| | | | | | | | PERSONAL & ADV INJURY | $ 1,000,000 |
| | GEN'L AGGREGATE LIMIT APPLIES PER: | | | | | | GENERAL AGGREGATE | $ 2,000,000 |
| | POLICY PRO-JECT LOC | | | | | | PRODUCTS - COMP/OP AGG | $ 2,000,000 |
| | OTHER: | | | | | | Emp Ben. | $ 1,000,000 |
| | AUTOMOBILE LIABILITY | | | | | | COMBINED SINGLE LIMIT (Ea accident) | $ 1,000,000 |
| A | X ANY AUTO | | | ADW5788777 | 07/15/2014 | 07/15/2015 | BODILY INJURY (Per person) | $ |
| | ALL OWNED AUTOS / SCHEDULED AUTOS | | | | | | BODILY INJURY (Per accident) | $ |
| | HIRED AUTOS / NON-OWNED AUTOS | | | | | | PROPERTY DAMAGE (Per accident) | $ |
| | | | | | | | | $ |
| | X UMBRELLA LIAB X OCCUR | | | | | | EACH OCCURRENCE | $ 5,000,000 |
| A | EXCESS LIAB CLAIMS-MADE | | | UHW5909480 | 07/15/2014 | 07/15/2015 | AGGREGATE | $ 5,000,000 |
| | DED X RETENTION $ 10,000 | | | | | | | $ |
| | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N | | | | | | PER STATUTE / OTH-ER | |
| | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) | N / A | | | | | E.L. EACH ACCIDENT | $ |
| | If yes, describe under DESCRIPTION OF OPERATIONS below | | | | | | E.L. DISEASE - EA EMPLOYEE | $ |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $ |
| A | School Leaders E&O | | | ZHW5909488 | 07/15/2014 | 07/15/2015 | SL E&O | 1,000,000 |
| A | Sexual Abuse | | | ZHW5909488 | 07/15/2014 | 07/15/2015 | Sex Abuse | 1,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
For Insured's Informational Purposes Only...

CERTIFICATE HOLDER

For Insured's Informational Purposes

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
Lakisa Skinner-Stanfield

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**INDIANA CHARTER SCHOOL BOARD**
5-Year Pro Forma Budget Submission Template

General Instructions for New School Applicants

- Complete the School Enrollment Projection tab in ORANGE
- Complete the Year 0 - Budget and Cash Flow tab in PURPLE
- Complete ALL FIVE annual budget tabs in BLUE
- Complete ALL FIVE staffing tabs in GREEN
- Enter information into the WHITE cells
- Do not enter information into the GREY cells

- NOTE: Applicants proposing to operate a network of schools should add a worksheet or attach a separate file reflecting the consolidated network's 5-Year pro-forma budget, reflecting all components - including the regional back office/central office - of the Indiana network.

- We encourage applicants to contact the Indiana Department of Education Office of School Finance to learn more about Indiana's funding formula and all grant and operating funds available. Visit **http://www.doe.in.gov/idoe/finance** for more information.

**School Name:The Excel Center - Muncie**

## SCHOOL ENROLLMENT PROJECTIONS

| Planned Number of Students | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ACADEMIC YEAR | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL | % ELL | % SPED | % SNAP, TANF or Foster Care |
| Year 1: 2017-2018 | | | | | | | | | | 75 | 75 | 75 | 75 | 300 | | | |
| Year 2: 2018-2019 | | | | | | | | | | 75 | 75 | 75 | 75 | 300 | | | |
| Year 3: 2019-2020 | | | | | | | | | | 75 | 75 | 75 | 75 | 300 | | | |
| Year 4: 2020-2021 | | | | | | | | | | 75 | 75 | 75 | 75 | 300 | | | |
| Year 5: 2021-2022 | | | | | | | | | | 75 | 75 | 75 | 75 | 300 | | | |

| Planned Number of Classes | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ACADEMIC YEAR | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
| Year 1: 2016-2017 | | | | | | | | | | | | | | 0 |
| Year 2: 2017-2018 | | | | | | | | | | | | | | 0 |
| Year 3: 2018-2019 | | | | | | | | | | | | | | 0 |
| Year 4: 2019-2020 | | | | | | | | | | | | | | 0 |
| Year 5: 2020-2021 | | | | | | | | | | | | | | 0 |

**Note: FDK students are treated as 1 for purposes of ADM. 1/2 day kindergarten students are 0.5 ADM**

| | 2016 | 2017 |
|---|---|---|
| **Foundation Grant** | **$ 4,967** | **$ 5,088** |
| **Complexity Grant** | **$ 3,489** | **$ 3,539** |

| School Name:The Excel Center - Muncie | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |
| | **Year 0** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| **REVENUE** | | | | | | |
| **State Revenue** | | | | | | |
| Basic Grant | | $ 2,025,000 | $ 2,025,000 | $ 2,025,000 | $ 2,025,000 | $ 2,025,000 |
| State Matching Funds for School Lunch Program | | $ - | $ - | $ - | $ - | $ - |
| Professional Development | | $ - | $ - | $ - | $ - | $ - |
| Technology Grants | | $ - | $ - | $ - | $ - | $ - |
| Remediation Program | | $ - | $ - | $ - | $ - | $ - |
| Gifted and Talented Program | | $ - | $ - | $ - | $ - | $ - |
| Textbook Reimbursement | | $ - | $ - | $ - | $ - | $ - |
| Summer School | | $ - | $ - | $ - | $ - | $ - |
| Charter and Innovation Network School Grant Program | | $ - | $ - | $ - | $ - | $ - |
| Charter and Innovation Network School Advance Program | | $ - | $ - | $ - | $ - | $ - |
| Other State Revenue (please describe) | | $ - | $ - | $ - | $ - | $ - |
| Other State Revenue (please describe) | | $ - | $ - | $ - | $ - | $ - |
| **Federal Revenue** | | | | | | |
| Public Charter School Program (PCSP) Grant | $ - | $ - | $ - | | | |
| Public Law 101-476 (IDEA) | | $ 20,000 | $ 41,000 | $ 41,000 | $ 41,000 | $ 41,000 |
| Title I | | $ - | $ - | $ - | $ - | $ - |
| Title II | | $ - | $ - | $ - | $ - | $ - |
| Federal Lunch Program | | $ - | $ - | $ - | $ - | $ - |
| Federal Breakfast Reimbursement | | $ - | $ - | $ - | $ - | $ - |
| Other Revenue Federal sources (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other Revenue Federal sources (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Other Revenues** | | | | | | |
| Committed Philanthropic Donations | $ - | $ - | $ - | $ - | $ - | $ - |
| Before and After Care Fees | | $ - | $ - | $ - | $ - | $ - |
| Interest Income | | $ - | $ - | $ - | $ - | $ - |
| Excel Center Network Transfers | $ 325,607 | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Revenue** | $ 325,607 | **$ 2,045,000** | **$ 2,066,000** | **$ 2,066,000** | **$ 2,066,000** | **$ 2,066,000** |
| | | | | | | |
| **EXPENDITURES** | | | | | | |
| **Personnel Expenses** | | | | | | |
| Wages, Benefits and Payroll Taxes | $ 97,112 | $ 984,431 | $ 1,068,689 | $ 1,082,008 | $ 1,082,361 | $ 1,082,679 |
| Substitute Teachers | | $ - | $ - | $ - | $ - | $ - |
| Professional Development | $ - | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Bonuses | | $ 3,500 | $ 3,605 | $ 3,713 | $ 3,725 | $ 3,725 |
| Tuition reimbrusement | $ - | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 |
| Staff stipends | $ - | $ 11,500 | $ 11,500 | $ 11,500 | $ 11,500 | $ 11,500 |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Personnel Expenses** | $ 97,112 | $ 1,024,431 | $ 1,108,794 | $ 1,122,221 | $ 1,122,586 | $ 1,122,904 |
| | | | | | | |
| **Instructional Supplies and Resources** | | | | | | |
| Textbooks | $ - | $ 5,000 | $ 2,500 | $ 2,500 | $ 2,500 | $ 2,500 |
| Library, periodicals, etc | $ - | $ - | $ - | $ - | $ - | $ - |
| Technology | $ 110,635 | $ - | $ 5,000 | $ 5,000 | $ 5,000 | $ 5,000 |
| Assessment materials | $ - | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Computers | $ 66,010 | $ 40,000 | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Software | $ - | $ 60,000 | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Other classroom supplies | $ - | $ 10,000 | $ 5,000 | $ 5,000 | $ 5,000 | $ 5,000 |
| Field trips, other unclassified items | $ - | $ - | $ - | $ - | $ - | $ - |
| Co-curricular & Athletics | $ - | $ - | $ - | $ - | $ - | $ - |
| Graduation | $ - | $ 3,500 | $ 4,000 | $ 4,500 | $ 5,000 | $ 5,500 |
| Student certifications and dual credit courses | $ - | $ 20,000 | $ 40,000 | $ 40,000 | $ 40,000 | $ 40,000 |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Instructional Supplies and Resources** | $ 176,645 | $ 148,500 | $ 86,500 | $ 87,000 | $ 87,500 | $ 88,000 |
| | | | | | | |
| **Support Supplies and Resources** | | | | | | |
| Administrative Computers | $ 34,000 | $ - | $ 6,000 | $ 6,000 | $ 6,000 | $ 6,000 |
| Administrative Software | $ - | $ - | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Administration Dues, fees, misc expenses | $ - | $ 1,500 | $ 1,500 | $ 1,500 | $ 1,500 | $ 1,500 |
| Office supplies | $ 2,750 | $ 4,000 | $ 4,000 | $ 4,500 | $ 4,500 | $ 4,500 |
| Student recruitment and materials | $ 12,000 | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 |
| Drop-in center supplies | $ - | $ 12,500 | $ 2,500 | $ 2,500 | $ 7,500 | $ 2,500 |
| Student barrier removal support | $ - | $ 3,000 | $ 3,000 | $ 3,000 | $ 3,000 | $ 3,000 |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Support Supplies and Resources** | $ 48,750 | $ 36,000 | $ 42,000 | $ 42,500 | $ 47,500 | $ 42,500 |
| | | | | | | |
| **Board Expenses** | | | | | | |
| Charter Board Services, including Board Training, retreats | $ - | $ - | $ - | $ - | $ - | $ - |

| | | | | | | |
|---|---|---|---|---|---|---|
| Charter Board Supplies & Equipment | $ - | $ - | $ - | $ - | $ - | $ - |
| Charter Board Dues, fees, etc | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Board Expenses** | $ - | $ - | $ - | $ - | $ - | $ - |
| | | | | | | |
| **Professional Purchased or Contracted Services** | | | | | | |
| Legal Services | $ 700 | $ 4,200 | $ 14,200 | $ 4,410 | $ 14,910 | $ 4,600 |
| Audit Services (compliant with SBOA requirements) | $ - | $ - | $ - | $ - | $ - | $ - |
| Payroll Services | $ - | $ - | $ - | $ - | $ - | $ - |
| Accounting Services | $ - | $ - | $ - | $ - | $ - | $ - |
| Printing/Newsletter/Annual Report Services | $ - | $ 5,000 | $ 5,500 | $ 6,000 | $ 6,500 | $ 7,000 |
| Consultants | $ - | $ - | $ - | $ - | $ - | $ - |
| Internet Services | $ - | $ 36,000 | $ 36,000 | $ 37,800 | $ 37,800 | $ 37,800 |
| Telephone/Telecommunication Services | $ - | $ - | $ - | $ - | $ - | $ - |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ - | $ 7,000 | $ 7,350 | $ 7,718 | $ 7,718 | $ 7,718 |
| Travel | $ 1,800 | $ 7,200 | $ 7,800 | $ 8,400 | $ 8,400 | $ 8,400 |
| Postage | $ 600 | $ 2,000 | $ 2,200 | $ 2,400 | $ 2,600 | $ 2,800 |
| Special Education Services | $ - | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 | $ 10,000 |
| Student Information Services | $ - | $ 30,000 | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 |
| Food service | $ - | $ - | $ - | $ - | $ - | $ - |
| Transportation | $ - | $ 22,500 | $ 22,500 | $ 25,500 | $ 25,500 | $ 25,500 |
| Nursing Services | $ - | $ - | $ - | $ - | $ - | $ - |
| INIS Fees | $ - | $ 300,000 | $ 300,000 | $ 300,000 | $ 300,000 | $ 300,000 |
| Security services | $ - | $ 40,800 | $ 40,800 | $ 40,800 | $ 40,800 | $ 40,800 |
| Equipment lease | $ - | $ 5,500 | $ 5,500 | $ 5,500 | $ 5,500 | $ 5,500 |
| Food purchases/meals | $ - | $ 2,500 | $ 2,500 | $ 2,500 | $ 2,500 | $ 2,500 |
| **Total Professional Purchased or Contracted Services** | $ 3,100 | $ 472,700 | $ 469,350 | $ 466,028 | $ 477,228 | $ 467,618 |
| | | | | | | |
| **Facilities** | | | | | | |
| Rent, mortgage, or other facility cost | $ - | $ 120,000 | $ 120,000 | $ 120,000 | $ 120,000 | $ 120,000 |
| Furniture & Equipment | $ - | $ 50,000 | $ 5,000 | $ 5,000 | $ 5,000 | $ 5,000 |
| Gas/electric | $ - | $ 30,000 | $ 30,000 | $ 30,000 | $ 30,000 | $ 30,000 |
| Water/Sewer | $ - | $ 12,000 | $ 12,000 | $ 12,000 | $ 12,000 | $ 12,000 |
| Grounds Keeping | $ - | $ - | $ - | $ - | $ - | $ - |
| Maintenance Services | $ - | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 | $ 15,000 |
| Custodial | $ - | $ 48,000 | $ 48,000 | $ 48,000 | $ 48,000 | $ 48,000 |
| Waste disposal | $ - | $ - | $ - | $ - | $ - | $ - |
| | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Facilities** | $ - | $ 275,000 | $ 230,000 | $ 230,000 | $ 230,000 | $ 230,000 |
| | | | | | | |
| **Other** | | | | | | |
| Contingency | $ - | $ - | $ - | $ - | $ - | $ - |
| Indiana Charter School Board Administrative Fee | $ - | $ 10,125 | $ 20,250 | $ 20,250 | $ 20,250 | $ 20,250 |
| CMO/EMO Fee | $ - | $ - | $ - | $ - | $ - | $ - |
| Charter and Innovation Network School Advance Program Interest Costs | $ - | $ - | $ - | $ - | $ - | $ - |
| Escrow account for closure | $ - | $ - | $ 10,000 | $ 10,000 | $ 10,000 | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| Other (please describe) | $ - | $ - | $ - | $ - | $ - | $ - |
| **Total Other** | $ - | $ 10,125 | $ 30,250 | $ 30,250 | $ 30,250 | $ 20,250 |
| | | | | | | |
| **Total Expenditures** | $ 325,607 | $ 1,966,756 | $ 1,966,894 | $ 1,977,999 | $ 1,995,063 | $ 1,971,272 |
| | | | | | | |
| **Carryover/Deficit** | $ - | $ 78,244 | $ 99,106 | $ 88,001 | $ 70,937 | $ 94,728 |
| | | | | | | |
| **Cumulative Carryover/(Deficit)** | $ - | $ 78,244 | $ 177,350 | $ 265,352 | $ 336,288 | $ 431,017 |

| The Excel Center - Muncie Annual Operating Budget and Cash Flow Projections -- YEAR 0 -- Pre-Opening Period | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Jun-16 | Jul-16 | Aug-16 | Sep-16 | Oct-16 | Nov-16 | Dec-16 | TOTAL 2016 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | TOTAL FIRST HALF 2017 |
| **REVENUE** | | | | | | | | | | | | | | | |
| **Federal Revenue** | | | | | | | | | | | | | | | |
| Public Charter School Program (PCSP) Grant (NOTE: this is a competitive grant. Funding is not guaranteed.) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other Revenue Federal sources (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other Revenue Federal sources (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Other Revenues** | | | | | | | | | | | | | | | |
| Committed Philanthropic Donations | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Excel Center Network Transfers | - | - | - | - | - | - | - | - | - | - | 8,067.00 | 26,937.00 | 27,287.00 | 263,316.00 | 325,607.00 |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Revenue** | **-** | **-** | **-** | **-** | **-** | **-** | **-** | **-** | **-** | **-** | **8,067.00** | **26,937.00** | **27,287.00** | **263,316.00** | **325,607.00** |
| | | | | | | | | | | | | | | | |
| **EXPENDITURES** | | | | | | | | | | | | | | | |
| **Personnel Expenses** | | | | | | | | | | | | | | | |
| Wages, Benefits and Payroll Taxes (TOTAL must match "Staffing Year 0") | - | - | - | - | - | - | - | - | - | - | 7,817.00 | 21,887.00 | 21,887.00 | 45,521.00 | 97,112.00 |
| Professional Development | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Personnel Expenses** | - | - | - | - | - | - | - | - | - | - | 7,817.00 | 21,887.00 | 21,887.00 | 45,521.00 | 97,112.00 |
| | | | | | | | | | | | | | | | |
| **Instructional Supplies and Resources** | | | | | | | | | | | | | | | |
| Textbooks | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Library, periodicals, etc | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Technology | - | - | - | - | - | - | - | - | - | - | - | - | - | 110,635.00 | 110,635.00 |
| Assessment materials | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Computers | - | - | - | - | - | - | - | - | - | - | - | - | - | 66,010.00 | 66,010.00 |
| Software | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other classroom supplies | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Field trips, other unclassified items | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Co-curricular & Athletics | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Instructional Supplies and Resources** | - | - | - | - | - | - | - | - | - | - | - | - | - | 176,645.00 | 176,645.00 |
| | | | | | | | | | | | | | | | |
| **Support Supplies and Resources** | | | | | | | | | | | | | | | |
| Administrative Computers | - | - | - | - | - | - | - | - | - | - | - | - | - | 34,000.00 | 34,000.00 |
| Administrative Software | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Administration Dues, fees, misc expenses | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Office supplies | - | - | - | - | - | - | - | - | - | - | 250.00 | 250.00 | 250.00 | 2,000.00 | 2,750.00 |
| Student recruitment and materials | - | - | - | - | - | - | - | - | - | - | - | 4,000.00 | 4,000.00 | 4,000.00 | 12,000.00 |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Support Supplies and Resources** | - | - | - | - | - | - | - | - | - | - | 250.00 | 4,250.00 | 4,250.00 | 40,000.00 | 48,750.00 |
| | | | | | | | | | | | | | | | |
| **Board Expenses** | | | | | | | | | | | | | | | |

| | Jun-16 | Jul-16 | Aug-16 | Sep-16 | Oct-16 | Nov-16 | Dec-16 | TOTAL 2016 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | TOTAL FIRST HALF 2017 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Charter Board Services, including Board Training, retreats | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Charter Board Supplies & Equipment | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Charter Board Dues, fees, etc | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Board Expenses** | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| | | | | | | | | | | | | | | | |
| **Professional Purchased or Contracted Services** | | | | | | | | | | | | | | | |
| Legal Services | - | - | - | - | - | - | - | - | - | - | - | - | 350.00 | 350.00 | 700.00 |
| Audit Services (compliant with SBOA requirements) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Payroll Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Accounting Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Printing/Newsletter/Annual Report Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Consultants | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Internet Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Telephone/Telecommunication Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Travel | - | - | - | - | - | - | - | - | - | - | - | 600.00 | 600.00 | 600.00 | 1,800.00 |
| Postage | - | - | - | - | - | - | - | - | - | - | - | 200.00 | 200.00 | 200.00 | 600.00 |
| Special Education Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Student Information Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Food service | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Transportation | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Nursing Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Student recruitment | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Professional Purchased or Contracted Services** | - | - | - | - | - | - | - | - | - | - | - | 800.00 | 1,150.00 | 1,150.00 | 3,100.00 |
| | | | | | | | | | | | | | | | |
| **Facilities** | | | | | | | | | | | | | | | |
| Rent, mortgage, or other facility cost | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Furniture & Equipment | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Gas/electric | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Water/ Sewer | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Grounds Keeping | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Maintenance Services | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Custodial | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Waste disposal | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Debt Service for Facilities (Interest Only) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Facilities** | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| | | | | | | | | | | | | | | | |
| **Other** | | | | | | | | | | | | | | | |
| Contingency | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Indiana Charter School Board Administrative Fee (0% in Year 0 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| CMO/EMO Fee | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Other (please describe) | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| **Total Other** | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |

| | Jun-16 | Jul-16 | Aug-16 | Sep-16 | Oct-16 | Nov-16 | Dec-16 | TOTAL 2016 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | TOTAL FIRST HALF 2017 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | |
| **Total Expenditures** | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ 8,067 | $ 26,937 | $ 27,287 | $ 263,316 | $ 325,607 |
| | | | | | | | | | | | | | | | |
| **Net Income (Pre-Cash Flow Adjustments)** | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - | $ - |
| | | | | | | | | | | | | | | | |
| **CASH FLOW ADJUSTMENTS** | | | | | | | | | | | | | | | |
| OPERATING ACTIVITIES | | | | | | | | | | | | | | | |
| Example - Add Back Depreciation | - | - | - | - | - | - | - | | - | - | - | - | - | - | - |
| Other | - | - | - | - | - | - | - | | - | - | - | - | - | - | - |

**The Excel Center - Muncie Staffing Needs -- Year 0 -- Pre-Opening Period**

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

**nber of months each staff would be employed during the applicable fiscal period. The percentage allocated towards benefits and payroll taxes was calc**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits | March | April | May | June |
|---|---|---|---|---|---|---|---|---|---|
| School Director | 0.33 | 70,000 | 23,333 | 7,933 | 31,267 | **$ 7,816.67** | **$ 7,816.67** | **$ 7,816.67** | **$ 7,816.67** |
| Instructor/Teacher | 0.25 | 45,000 | 11,250 | 3,825 | 15,075 | | | | **$ 15,075.00** |
| Lead Instructor | 0.25 | 45,000 | 11,250 | 3,825 | 15,075 | | **$ 5,025.00** | **$ 5,025.00** | **$ 5,025.00** |
| Coach | 0.08 | 39,650 | 3,304 | 1,123 | 4,428 | | | | **$ 4,427.58** |
| College and Career Readiness Specialist | 0.04 | 41,000 | 1,708 | 581 | 2,289 | | | | **$ 2,289.17** |
| Lead Coach | 0.25 | 41,000 | 10,250 | 3,485 | 13,735 | | **$ 4,578.33** | **$ 4,578.33** | **$ 4,578.33** |
| Manager, Office Administrator | 0.25 | 40,000 | 10,000 | 3,400 | 13,400 | | **$ 4,466.67** | **$ 4,466.67** | **$ 4,466.67** |
| Drop in Center Manager | 0.04 | 33,000 | 1,375 | 468 | 1,843 | | | | **$ 1,842.50** |
| | | | | | | | | | |
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| | | | - | | - | | | | |
| | | | - | | - | | | | |
| **TOTAL** | | | 72,471 | 24,640 | 97,111 | $ 7,817.00 | $ 21,887.00 | $ 21,887.00 | $ 45,521.00 |

| The Excel Center - Muncie Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1-June 30 | | |
|---|---|---|
| **REVENUE** | **Amount** | **Notes** |
| **State Revenue** | | |
| Basic Grant | $ 2,025,000 | **Budgeting $6,750 per Adult Learner Student** |
| State Matching Funds for School Lunch Program | | |
| Professional Development | | |
| Technology Grants | | |
| Remediation Program | | |
| Gifted and Talented Program | | |
| Textbook Reimbursement | | |
| Summer School | | |
| Charter and Innovation Network School Grant Program | | **Under the FY16/17 appropriation, all charters in their first two years are automatically awarded $500 / student for capital and transportation costs. Please review IC 20-24-13 for criteria for schools in subsequent years.** |
| Charter and Innovation Network School Advance Program | | **Note: Please review IC 20-49-9 for information.** |
| Other State Revenue (please describe) | | |
| Other State Revenue (please describe) | | |
| **Federal Revenue** | | |
| Public Charter School Program (PCSP) Grant | | **NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.** |
| Public Law 101-476 (IDEA) | $ 20,000 | Assuming a half year of spending against a total award of approximately $41,000. The $41,000 award is comparable to that of a similar Excel Center with 300 students. |
| Title I | | |
| Title II | | |
| Federal Lunch Program | | |
| Federal Breakfast Reimbursement | | |
| Other Revenue Federal sources (please describe) | | |
| Other Revenue Federal sources (please describe) | | |
| **Other Revenues** | | |
| Committed Philanthropic Donations | | |
| Before and After Care Fees | | |
| Interest Income | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Revenue** | $ 2,045,000 | |
| | | |
| **EXPENDITURES** | | |
| **Personnel Expenses** | | |
| Wages, Benefits and Payroll Taxes | $ 984,431 | Use staffing workbook |
| Substitute Teachers | | |
| Professional Development | $ 10,000 | |
| Bonuses | $ 3,500 | |
| Tuition reimbrusement | $ 15,000 | |
| Staff stipends | $ 11,500 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Personnel Expenses** | $ 1,024,431 | |
| | | |
| **Instructional Supplies and Resources** | | |
| Textbooks | $ 5,000 | |

| | | |
|---|---|---|
| Library, periodicals, etc | | |
| Technology | | Technology purchases were incurred prior to opening |
| Assessment materials | $ 10,000 | |
| Computers | $ 40,000 | Student laptops and PCs |
| Software | $ 60,000 | Curruiculum and remidiation software |
| Other classroom supplies | $ 10,000 | $5,000 during term 1 and $1,000 each subsequent term |
| Field trips, other unclassified items | | |
| Co-curricular & Athletics | | |
| Graduation | $ 3,500 | |
| Student certifications and dual credit courses | $ 20,000 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Instructional Supplies and Resources** | $ 148,500 | |
| | | |
| **Support Supplies and Resources** | | |
| Administrative Computers | | all staff machines purchased during the pre-opening period. |
| Administrative Software | | |
| Administration Dues, fees, misc expenses | $ 1,500 | |
| Office supplies | $ 4,000 | |
| Student recruitment and materials | $ 15,000 | |
| Drop-in center supplies | $ 12,500 | General supplies and equipment purchases |
| Student barrier removal support | $ 3,000 | $10 per student |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Support Supplies and Resources** | $ 36,000 | |
| | | |
| **Board Expenses** | | |
| Charter Board Services, including Board Training, retreats | | included in INIS fees |
| Charter Board Supplies & Equipment | | included in INIS fees |
| Charter Board Dues, fees, etc | | included in INIS fees |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Board Expenses** | $ - | |
| | | |
| **Professional Purchased or Contracted Services** | | |
| Legal Services | $ 4,200 | |
| Audit Services (compliant with SBOA requirements) | | included in INIS fees |
| Payroll Services | | included in INIS fees |
| Accounting Services | | included in INIS fees |
| Printing/Newsletter/Annual Report Services | $ 5,000 | |
| Consultants | | |
| Internet Services | $ 36,000 | includes internet and telephone |
| Telephone/Telecommunication Services | | |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ 7,000 | Annual network allocation of insurance costs |
| Travel | $ 7,200 | |
| Postage | $ 2,000 | |
| Special Education Services | $ 10,000 | |
| Student Information Services | $ 30,000 | Network allocation for the acquisition and setup of a new student information system |
| Food service | | |
| Transportation | $ 22,500 | $75 per student for transportation assistance |
| Nursing Services | | |
| INIS Fees | $ 300,000 | |
| Security services | $ 40,800 | Securitas fees |

| | | |
|---|---|---|
| Equipment lease | $ 5,500 | copier lease |
| Food purchases/meals | $ 2,500 | ***$500 per term*** |
| **Total Professional Purchased or Contracted Services** | $ 472,700 | |
| | | |
| **Facilities** | | |
| Rent, mortgage, or other facility cost | $ 120,000 | Targeted rental facility of 20,000 square ft. at $6 per square foot, annually |
| Furniture & Equipment | $ 50,000 | |
| Gas/electric | $ 30,000 | Assuming $2,500 per month based on figures from a comparable school |
| Water/ Sewer | $ 12,000 | Assuming $1,000 per month based on figures from a comparable school |
| Grounds Keeping | | included in rent |
| Maintenance Services | $ 15,000 | |
| Custodial | $ 48,000 | contracted services at $4,000 per month |
| Waste disposal | | included in rent |
| Debt Service for Facilities (Interest Only) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Facilities** | $ 275,000 | |
| | | |
| **Other** | | |
| Contingency | | |
| Indiana Charter School Board Administrative Fee | $ 10,125 | **Assume 1% of Basic Grant (Row 6).** |
| CMO/EMO Fee | | **Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.** |
| Charter and Innovation Network School Advance Program Interest Costs | | |
| Escrow account for dissillusionment / closure | | **Schools are required to maintain an account in reserve to cover expenses for school closing. $10,000 should be placed in reserve starting in year 2 with a balance of $30,000 by year 4.** |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Other** | $ 10,125 | |
| | | |
| **Total Expenditures** | $ 1,966,756 | |
| **Carryover/Deficit** | $ 78,244 | |

Cumulative Carryover/(Deficit)

**The Excel Center - Muncie Staffing Needs -- Year 1**

**Please fill in the expected positions along with salary and benefit extimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits |
|---|---|---|---|---|---|
| School Director | 1 | 70,000 | 70,000 | 23,800 | 93,800 |
| Instructor/Teacher | 7 | 45,000 | 315,000 | 107,100 | 422,100 |
| Lead Instructor | 1 | 45,000 | 45,000 | 15,300 | 60,300 |
| Coach | 2 | 39,650 | 79,300 | 26,962 | 106,262 |
| College and Career Readiness Specialist | 1 | 41,000 | 41,000 | 13,940 | 54,940 |
| Lead Coach | 1 | 41,000 | 41,000 | 13,940 | 54,940 |
| Manager, Office Administrator | 1 | 40,000 | 40,000 | 13,600 | 53,600 |
| Drop-In Center Manager | 1 | 33,000 | 33,000 | 11,220 | 44,220 |
| Drop-In Center Attendant | 2 | 20,800 | 41,600 | 14,144 | 55,744 |
| Excel Center Network Director | 0.08 | 105,000 | 8,750 | 2,975 | 11,725 |
| Project Manager | 0.33 | 60,000 | 20,000 | 6,800 | 26,800 |
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| **TOTAL** | | | 734,650 | 249,781 | 984,431 |

| The Excel Center - Muncie Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1-June 30 | | |
|---|---|---|
| **REVENUE** | **Amount** | **Notes** |
| **State Revenue** | | |
| Basic Grant | $ 2,025,000 | **Budgeting $6,750 per Adult Learner Student** |
| State Matching Funds for School Lunch Program | | |
| Professional Development | | |
| Technology Grants | | |
| Remediation Program | | |
| Gifted and Talented Program | | |
| Textbook Reimbursement | | |
| Summer School | | |
| Charter and Innovation Network School Grant Program | | **Under the FY16/17 appropriation, all charters in their first two years are automatically awarded $500 / student for capital and transportation costs. Please review IC 20-24-13 for criteria for schools in subsequent years.** |
| Charter and Innovation Network School Advance Program | | **Note: Please review IC 20-49-9 for information.** |
| Other State Revenue (please describe) | | |
| Other State Revenue (please describe) | | |
| **Federal Revenue** | | |
| Public Charter School Program (PCSP) Grant | | **NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.** |
| Public Law 101-476 (IDEA) | $ 41,000 | The $41,000 award is comparable to that of a similar Excel Center with 300 students. |
| Title I | | |
| Title II | | |
| Federal Lunch Program | | |
| Federal Breakfast Reimbursement | | |
| Other Revenue Federal sources (please describe) | | |
| Other Revenue Federal sources (please describe) | | |
| **Other Revenues** | | |
| Committed Philanthropic Donations | | |
| Before and After Care Fees | | |
| Interest Income | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Revenue** | $ 2,066,000 | |
| | | |
| **EXPENDITURES** | | |
| **Personnel Expenses** | | |
| Wages, Benefits and Payroll Taxes | $ 1,068,689 | Use staffing workbook |
| Substitute Teachers | | |
| Professional Development | $ 10,000 | |
| Bonuses | $ 3,605 | |
| Tuition reimbrusement | $ 15,000 | |
| Staff stipends | $ 11,500 | |
| Other (please describe) | | |

| | | |
|---|---|---|
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Personnel Expenses** | $ 1,108,794 | |
| | | |
| **Instructional Supplies and Resources** | | |
| Textbooks | $ 2,500 | |
| Library, periodicals, etc | | |
| Technology | $ 5,000 | miscellaneous technology purchases |
| Assessment materials | $ 10,000 | |
| Computers | $ 10,000 | Student laptops and PCs |
| Software | $ 10,000 | Curruiculum and remidiation software renewal |
| Other classroom supplies | $ 5,000 | $1,000 per term |
| Field trips, other unclassified items | | |
| Co-curricular & Athletics | | |
| Graduation | $ 4,000 | |
| Student certifications and dual credit courses | $ 40,000 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Instructional Supplies and Resources** | $ 86,500 | |
| | | |
| **Support Supplies and Resources** | | |
| Administrative Computers | $ 6,000 | Two staff replacements at $3,000 each |
| Administrative Software | $ 10,000 | Software licenses |
| Administration Dues, fees, misc expenses | $ 1,500 | |
| Office supplies | $ 4,000 | |
| Student recruitment and materials | $ 15,000 | |
| Drop-in center supplies | $ 2,500 | |
| Student barrier removal support | $ 3,000 | $10 per student |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Support Supplies and Resources** | $ 42,000 | |
| | | |
| **Board Expenses** | | |
| Charter Board Services, including Board Training, retreats | | included in INIS fees |
| Charter Board Supplies & Equipment | | included in INIS fees |
| Charter Board Dues, fees, etc | | included in INIS fees |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Board Expenses** | $ - | |
| | | |
| **Professional Purchased or Contracted Services** | | |
| Legal Services | $ 14,200 | |
| Audit Services (compliant with SBOA requirements) | | included in INIS fees |
| Payroll Services | | included in INIS fees |
| Accounting Services | | included in INIS fees |
| Printing/Newsletter/Annual Report Services | $ 5,500 | |
| Consultants | | |
| Internet Services | $ 36,000 | includes internet and telephone |
| Telephone/Telecommunication Services | | |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ 7,350 | Annual network allocation of insurance costs |
| Travel | $ 7,800 | |

| | | | |
|---|---|---|---|
| Postage | $ | 2,200 | |
| Special Education Services | $ | 10,000 | |
| Student Information Services | $ | 15,000 | Projected network allocation of information system maintenance costs |
| Food service | | | |
| Transportation | $ | 22,500 | $75 per student for transportation assistance |
| Nursing Services | | | |
| INIS Fees | $ | 300,000 | |
| Security services | $ | 40,800 | Securitas fees |
| Equipment lease | $ | 5,500 | copier lease |
| Food purchases/meals | $ | 2,500 | ***$500 per term*** |
| **Total Professional Purchased or Contracted Services** | $ | 469,350 | |
| | | | |
| **Facilities** | | | |
| Rent, mortgage, or other facility cost | $ | 120,000 | Targeted rental facility of 20,000 square ft. at $6 per square foot, annually |
| Furniture & Equipment | $ | 5,000 | |
| Gas/electric | $ | 30,000 | Assuming $2,500 per month based on figures from a comparable school |
| Water/ Sewer | $ | 12,000 | Assuming $1,000 per month based on figures from a comparable school |
| Grounds Keeping | | | included in rent |
| Maintenance Services | $ | 15,000 | |
| Custodial | $ | 48,000 | contracted services at $4,000 per month |
| Waste disposal | | | included in rent |
| Debt Service for Facilities (Interest Only) | | | |
| Other (please describe) | | | |
| Other (please describe) | | | |
| Other (please describe) | | | |
| Other (please describe) | | | |
| **Total Facilities** | $ | 230,000 | |
| | | | |
| **Other** | | | |
| Contingency | | | |
| Indiana Charter School Board Administrative Fee | $ | 20,250 | **Assume 1% of Basic Grant (Row 6).** |
| CMO/EMO Fee | | | **Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.** |
| Charter and Innovation Network School Advance Program Interest Costs | | | |
| Escrow account for dissillusionment / closure | $ | 10,000 | **Schools are required to maintain an account in reserve to cover expenses for school closing. $10,000 should be placed in reserve starting in year 2 with a balance of $30,000 by year 4.** |
| Other (please describe) | | | |
| Other (please describe) | | | |
| **Total Other** | $ | 30,250 | |
| | | | |
| **Total Expenditures** | $ | 1,966,894 | |
| **Carryover/Deficit** | $ | 99,106 | |

Cumulative Carryover/(Deficit)

**The Excel Center - Muncie Staffing Needs -- Year 2**

**Please fill in the expected positions along with salary and benefit extimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits |
|---|---|---|---|---|---|
| School Director | 1 | 72,100 | 72,100 | 24,514 | 96,614 |
| Instructor/Teacher | 7 | 46,350 | 324,450 | 110,313 | 434,763 |
| Lead Instructor | 1 | 46,350 | 46,350 | 15,759 | 62,109 |
| Coach | 3 | 40,840 | 122,519 | 41,656 | 164,175 |
| College and Career Readiness Specialist | 1 | 42,230 | 42,230 | 14,358 | 56,588 |
| Lead Coach | 1 | 42,230 | 42,230 | 14,358 | 56,588 |
| Manager, Office Administrator | 1 | 41,200 | 41,200 | 14,008 | 55,208 |
| Drop-In Center Manager | 1 | 33,990 | 33,990 | 11,557 | 45,547 |
| Drop-In Center Attendant | 2 | 21,424 | 42,848 | 14,568 | 57,416 |
| Excel Center Network Director | 0.08 | 108,150 | 9,013 | 3,064 | 12,077 |
| Project Manager | 0.33 | 61,800 | 20,600 | 7,004 | 27,604 |
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| **TOTAL** | | | 797,529 | 271,160 | 1,068,689 |

| The Excel Center - Muncie Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1-June 30 | | |
|---|---|---|
| **REVENUE** | **Amount** | **Notes** |
| **State Revenue** | | |
| Basic Grant | $ 2,025,000 | **Budgeting $6,750 per Adult Learner Student** |
| State Matching Funds for School Lunch Program | | |
| Professional Development | | |
| Technology Grants | | |
| Remediation Program | | |
| Gifted and Talented Program | | |
| Textbook Reimbursement | | |
| Summer School | | |
| Charter and Innovation Network School Grant Program | | **Under the FY16/17 appropriation, all charters in their first two years are automatically awarded $500 / student for capital and transportation costs. Please review IC 20-24-13 for criteria for schools in subsequent years.** |
| Charter and Innovation Network School Advance Program | | **Note: Please review IC 20-49-9 for information.** |
| Other State Revenue (please describe) | | |
| Other State Revenue (please describe) | | |
| **Federal Revenue** | | |
| Public Law 101-476 (IDEA) | $ 41,000 | The $41,000 award is comparable to that of a similar Excel Center with 300 students. |
| Title I | | |
| Title II | | |
| Federal Lunch Program | | |
| Federal Breakfast Reimbursement | | |
| Other Revenue Federal sources (please describe) | | |
| Other Revenue Federal sources (please describe) | | |
| **Other Revenues** | | |
| Committed Philanthropic Donations | | |
| Before and After Care Fees | | |
| Interest Income | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Revenue** | $ 2,066,000 | |
| | | |
| **EXPENDITURES** | | |
| **Personnel Expenses** | | |
| Wages, Benefits and Payroll Taxes | $ 1,082,008 | Use staffing workbook |
| Substitute Teachers | | |
| Professional Development | $ 10,000 | |
| Bonuses | $ 3,713 | |
| Tuition reimbrusement | $ 15,000 | |
| Staff stipends | $ 11,500 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Personnel Expenses** | $ 1,122,221 | |
| | | |

| | | |
|---|---|---|
| **Instructional Supplies and Resources** | | |
| Textbooks | $ 2,500 | |
| Library, periodicals, etc | | |
| Technology | $ 5,000 | miscellaneous technology purchases |
| Assessment materials | $ 10,000 | |
| Computers | $ 10,000 | Student laptops and PCs |
| Software | $ 10,000 | Curruiculum and remidiation software renewal |
| Other classroom supplies | $ 5,000 | $1,000 per term |
| Field trips, other unclassified items | | |
| Co-curricular & Athletics | | |
| Graduation | $ 4,500 | |
| Student certifications and dual credit courses | $ 40,000 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Instructional Supplies and Resources** | $ 87,000 | |
| | | |
| **Support Supplies and Resources** | | |
| Administrative Computers | $ 6,000 | Two staff replacements at $3,000 each |
| Administrative Software | $ 10,000 | Software licenses |
| Administration Dues, fees, misc expenses | $ 1,500 | |
| Office supplies | $ 4,500 | |
| Student recruitment and materials | $ 15,000 | |
| Drop-in center supplies | $ 2,500 | |
| Student barrier removal support | $ 3,000 | $10 per student |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Support Supplies and Resources** | $ 42,500 | |
| | | |
| **Board Expenses** | | |
| Charter Board Services, including Board Training, retreats | | |
| Charter Board Supplies & Equipment | | |
| Charter Board Dues, fees, etc | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Board Expenses** | $ - | |
| | | |
| **Professional Purchased or Contracted Services** | | |
| Legal Services | $ 4,410 | |
| Audit Services (compliant with SBOA requirements) | | included in INIS fees |
| Payroll Services | | included in INIS fees |
| Accounting Services | | included in INIS fees |
| Printing/Newsletter/Annual Report Services | $ 6,000 | |
| Consultants | | |
| Internet Services | $ 37,800 | includes internet and telephone |
| Telephone/Telecommunication Services | | |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ 7,718 | Annual network allocation of insurance costs |
| Travel | $ 8,400 | |
| Postage | $ 2,400 | |
| Special Education Services | $ 10,000 | |

| | | |
|---|---|---|
| Student Information Services | $ 15,000 | Projected network allocation of information system maintenance costs |
| Food service | | |
| Transportation | $ 25,500 | $85 per student for transportation assistance |
| Nursing Services | | |
| INIS Fees | $ 300,000 | |
| Security services | $ 40,800 | Securitas fees |
| Equipment lease | $ 5,500 | copier lease |
| Food purchases/meals | $ 2,500 | ***$500 per term*** |
| **Total Professional Purchased or Contracted Services** | $ 466,028 | |
| | | |
| **Facilities** | | |
| Rent, mortgage, or other facility cost | $ 120,000 | Targeted rental facility of 20,000 square ft. at $6 per square foot, annually |
| Furniture & Equipment | $ 5,000 | |
| Gas/electric | $ 30,000 | Assuming $2,500 per month based on figures from a comparable school |
| Water/ Sewer | $ 12,000 | Assuming $1,000 per month based on figures from a comparable school |
| Grounds Keeping | | included in rent |
| Maintenance Services | $ 15,000 | |
| Custodial | $ 48,000 | contracted services at $4,000 per month |
| Waste disposal | | included in rent |
| Debt Service for Facilities (Interest Only) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Facilities** | $ 230,000 | |
| | | |
| **Other** | | |
| Contingency | | |
| Indiana Charter School Board Administrative Fee | $ 20,250 | **Assume 1% of Basic Grant (Row 6).** |
| CMO/EMO Fee | | **Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.** |
| Charter and Innovation Network School Advance Program Interest Costs | | |
| Escrow account for dissillusionment / closure | $ 10,000 | **Schools are required to maintain an account in reserve to cover expenses for school closing. $10,000 should be placed in reserve starting in year 2 with a balance of $30,000 by year 4.** |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Other** | $ 30,250 | |
| | | |
| **Total Expenditures** | $ 1,977,999 | |
| **Carryover/Deficit** | $ 88,001 | |

Cumulative Carryover/(Deficit)

**The Excel Center - Muncie Staffing Needs -- Year 3**

**Please fill in the expected positions along with salary and benefit extimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits |
|---|---|---|---|---|---|
| School Director | 1 | 74,263 | 74,263 | 25,249 | 99,512 |
| Instructor/Teacher | 7 | 46,350 | 324,450 | 110,313 | 434,763 |
| Lead Instructor | 1 | 46,350 | 46,350 | 15,759 | 62,109 |
| Coach | 3 | 42,065 | 126,196 | 42,907 | 169,102 |
| College and Career Readiness Specialist | 1 | 42,065 | 42,065 | 14,302 | 56,367 |
| Lead Coach | 1 | 42,065 | 42,065 | 14,302 | 56,367 |
| Manager, Office Administrator | 1 | 42,436 | 42,436 | 14,428 | 56,864 |
| Drop-In Center Manager | 1 | 35,010 | 35,010 | 11,903 | 46,913 |
| Drop-In Center Attendant | 2 | 22,067 | 44,133 | 15,005 | 59,139 |
| Excel Center Network Director | 0.08 | 111,395 | 9,283 | 3,156 | 12,439 |
| Project Manager | 0.33 | 63,654 | 21,218 | 7,214 | 28,432 |
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| **TOTAL** | | | 807,469 | 274,539 | 1,082,008 |

| The Excel Center - Muncie Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1-June 30 | | |
|---|---|---|
| **REVENUE** | **Amount** | **Notes** |
| **State Revenue** | | |
| Basic Grant | $ 2,025,000 | **Budgeting $6,750 per Adult Learner Student** |
| State Matching Funds for School Lunch Program | | |
| Professional Development | | |
| Technology Grants | | |
| Remediation Program | | |
| Gifted and Talented Program | | |
| Textbook Reimbursement | | |
| Summer School | | |
| Charter and Innovation Network School Grant Program | | **Under the FY16/17 appropriation, all charters in their first two years are automatically awarded $500 / student for capital and transportation costs. Please review IC 20-24-13 for criteria for schools in subsequent years.** |
| Charter and Innovation Network School Advance Program | | **Note: Please review IC 20-49-9 for information.** |
| Other State Revenue (please describe) | | |
| Other State Revenue (please describe) | | |
| **Federal Revenue** | | |
| Public Law 101-476 (IDEA) | $ 41,000 | The $41,000 award is comparable to that of a similar Excel Center with 300 students. |
| Title I | | |
| Title II | | |
| Federal Lunch Program | | |
| Federal Breakfast Reimbursement | | |
| Other Revenue Federal sources (please describe) | | |
| Other Revenue Federal sources (please describe) | | |
| **Other Revenues** | | |
| Committed Philanthropic Donations | | |
| Before and After Care Fees | | |
| Interest Income | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Revenue** | $ 2,066,000 | |
| | | |
| **EXPENDITURES** | | |
| **Personnel Expenses** | | |
| Wages, Benefits and Payroll Taxes | $ 1,082,361 | Use staffing workbook |
| Substitute Teachers | | |
| Professional Development | $ 10,000 | |
| Bonuses | $ 3,725 | |
| Tuition reimbrusement | $ 15,000 | |
| Staff stipends | $ 11,500 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Personnel Expenses** | $ 1,122,586 | |
| | | |

| | | |
|---|---|---|
| **Instructional Supplies and Resources** | | |
| Textbooks | $ 2,500 | |
| Library, periodicals, etc | | |
| Technology | $ 5,000 | miscellaneous technology purchases |
| Assessment materials | $ 10,000 | |
| Computers | $ 10,000 | Student laptops and PCs |
| Software | $ 10,000 | Curruiculum and remidiation software renewal |
| Other classroom supplies | $ 5,000 | $1,000 per term |
| Field trips, other unclassified items | | |
| Co-curricular & Athletics | | |
| Graduation | $ 5,000 | |
| Student certifications and dual credit courses | $ 40,000 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Instructional Supplies and Resources** | $ 87,500 | |
| | | |
| **Support Supplies and Resources** | | |
| Administrative Computers | $ 6,000 | Two staff replacements at $3,000 each |
| Administrative Software | $ 10,000 | Software licenses |
| Administration Dues, fees, misc expenses | $ 1,500 | |
| Office supplies | $ 4,500 | |
| Student recruitment and materials | $ 15,000 | |
| Drop-in center supplies | $ 7,500 | $2,500 plus $5,000 for equipment refresh |
| Student barrier removal support | $ 3,000 | $10 per student |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Support Supplies and Resources** | $ 47,500 | |
| | | |
| **Board Expenses** | | |
| Charter Board Services, including Board Training, retreats | | |
| Charter Board Supplies & Equipment | | |
| Charter Board Dues, fees, etc | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Board Expenses** | $ - | |
| | | |
| **Professional Purchased or Contracted Services** | | |
| Legal Services | $ 14,910 | |
| Audit Services (compliant with SBOA requirements) | | included in INIS fees |
| Payroll Services | | included in INIS fees |
| Accounting Services | | included in INIS fees |
| Printing/Newsletter/Annual Report Services | $ 6,500 | |
| Consultants | | |
| Internet Services | $ 37,800 | includes internet and telephone |
| Telephone/Telecommunication Services | | |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ 7,718 | Annual network allocation of insurance costs |
| Travel | $ 8,400 | |
| Postage | $ 2,600 | |
| Special Education Services | $ 10,000 | |

| | | |
|---|---|---|
| Student Information Services | $ 15,000 | Projected network allocation of information system maintenance costs |
| Food service | | |
| Transportation | $ 25,500 | $85 per student for transportation assistance |
| Nursing Services | | |
| INIS Fees | $ 300,000 | |
| Security services | $ 40,800 | Securitas fees |
| Equipment lease | $ 5,500 | copier lease |
| Food purchases/meals | $ 2,500 | ***$500 per term*** |
| **Total Professional Purchased or Contracted Services** | $ 477,228 | |
| | | |
| **Facilities** | | |
| Rent, mortgage, or other facility cost | $ 120,000 | Targeted rental facility of 20,000 square ft. at $6 per square foot, annually |
| Furniture & Equipment | $ 5,000 | |
| Gas/electric | $ 30,000 | Assuming $2,500 per month based on figures from a comparable school |
| Water/ Sewer | $ 12,000 | Assuming $1,000 per month based on figures from a comparable school |
| Grounds Keeping | | included in rent |
| Maintenance Services | $ 15,000 | |
| Custodial | $ 48,000 | contracted services at $4,000 per month |
| Waste disposal | | included in rent |
| Debt Service for Facilities (Interest Only) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Facilities** | $ 230,000 | |
| | | |
| **Other** | | |
| Contingency | | |
| Indiana Charter School Board Administrative Fee | $ 20,250 | **Assume 1% of Basic Grant (Row 6).** |
| CMO/EMO Fee | | **Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.** |
| Charter and Innovation Network School Advance Program Interest Costs | | |
| Escrow account for dissillusionment / closure | $ 10,000 | **Schools are required to maintain an account in reserve to cover expenses for school closing. $10,000 should be placed in reserve starting in year 2 with a balance of $30,000 by year 4.** |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Other** | $ 30,250 | |
| | | |
| **Total Expenditures** | $ 1,995,063 | |
| **Carryover/Deficit** | $ 70,937 | |

Cumulative Carryover/(Deficit)

**The Excel Center - Muncie Staffing Needs -- Year 4**

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits |
|---|---|---|---|---|---|
| School Director | 1 | 74,500 | 74,500 | 25,330 | 99,830 |
| Instructor/Teacher | 7 | 46,350 | 324,450 | 110,313 | 434,763 |
| Lead Instructor | 1 | 46,350 | 46,350 | 15,759 | 62,109 |
| Coach | 3 | 42,060 | 126,180 | 42,901 | 169,081 |
| College and Career Readiness Specialist | 1 | 42,060 | 42,060 | 14,300 | 56,360 |
| Lead Coach | 1 | 42,060 | 42,060 | 14,300 | 56,360 |
| Manager, Office Administrator | 1 | 42,440 | 42,440 | 14,430 | 56,870 |
| Drop-In Center Manager | 1 | 35,010 | 35,010 | 11,903 | 46,913 |
| Drop-In Center Attendant | 2 | 22,060 | 44,120 | 15,001 | 59,121 |
| Excel Center Network Director | 0.08 | 114,742 | 9,562 | 3,251 | 12,813 |
| Project Manager | 0.33 | 63,000 | 21,000 | 7,140 | 28,140 |
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| **TOTAL** | | | 807,732 | 274,629 | 1,082,361 |

| The Excel Center - Muncie Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1-June 30 | | |
|---|---|---|
| **REVENUE** | **Amount** | **Notes** |
| **State Revenue** | | |
| Basic Grant | $ 2,025,000 | **Budgeting $6,750 per Adult Learner Student** |
| State Matching Funds for School Lunch Program | | |
| Professional Development | | |
| Technology Grants | | |
| Remediation Program | | |
| Gifted and Talented Program | | |
| Textbook Reimbursement | | |
| Summer School | | |
| Charter and Innovation Network School Grant Program | | **Under the FY16/17 appropriation, all charters in their first two years are automatically awarded $500 / student for capital and transportation costs. Please review IC 20-24-13 for criteria for schools in subsequent years.** |
| Charter and Innovation Network School Advance Program | | **Note: Please review IC 20-49-9 for information.** |
| Other State Revenue (please describe) | | |
| Other State Revenue (please describe) | | |
| **Federal Revenue** | | |
| Public Law 101-476 (IDEA) | $ 41,000 | The $41,000 award is comparable to that of a similar Excel Center with 300 students. |
| Title I | | |
| Title II | | |
| Federal Lunch Program | | |
| Federal Breakfast Reimbursement | | |
| Other Revenue Federal sources (please describe) | | |
| Other Revenue Federal sources (please describe) | | |
| **Other Revenues** | | |
| Committed Philanthropic Donations | | |
| Before and After Care Fees | | |
| Interest Income | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Revenue** | $ 2,066,000 | |
| | | |
| **EXPENDITURES** | | |
| **Personnel Expenses** | | |
| Wages, Benefits and Payroll Taxes | $ 1,082,679 | Use staffing workbook |
| Substitute Teachers | | |
| Professional Development | $ 10,000 | |
| Bonuses | $ 3,725 | |
| Tuition reimbrusement | $ 15,000 | |
| Staff stipends | $ 11,500 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Personnel Expenses** | $ 1,122,904 | |
| | | |

| | | |
|---|---|---|
| **Instructional Supplies and Resources** | | |
| Textbooks | $ 2,500 | |
| Library, periodicals, etc | | |
| Technology | $ 5,000 | miscellaneous technology purchases |
| Assessment materials | $ 10,000 | |
| Computers | $ 10,000 | Student laptops and PCs |
| Software | $ 10,000 | Curruiculum and remidiation software renewal |
| Other classroom supplies | $ 5,000 | $1,000 per term |
| Field trips, other unclassified items | | |
| Co-curricular & Athletics | | |
| Graduation | $ 5,500 | |
| Student certifications and dual credit courses | $ 40,000 | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Instructional Supplies and Resources** | $ 88,000 | |
| | | |
| **Support Supplies and Resources** | | |
| Administrative Computers | $ 6,000 | Two staff replacements at $3,000 each |
| Administrative Software | $ 10,000 | Software licenses |
| Administration Dues, fees, misc expenses | $ 1,500 | |
| Office supplies | $ 4,500 | |
| Student recruitment and materials | $ 15,000 | |
| Drop-in center supplies | $ 2,500 | |
| Student barrier removal support | $ 3,000 | $10 per student |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Support Supplies and Resources** | $ 42,500 | |
| | | |
| **Board Expenses** | | |
| Charter Board Services, including Board Training, retreats | | |
| Charter Board Supplies & Equipment | | |
| Charter Board Dues, fees, etc | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Board Expenses** | $ - | |
| | | |
| **Professional Purchased or Contracted Services** | | |
| Legal Services | $ 4,600 | |
| Audit Services (compliant with SBOA requirements) | | included in INIS fees |
| Payroll Services | | included in INIS fees |
| Accounting Services | | included in INIS fees |
| Printing/Newsletter/Annual Report Services | $ 7,000 | |
| Consultants | | |
| Internet Services | $ 37,800 | includes internet and telephone |
| Telephone/Telecommunication Services | | |
| Total Insurance Costs (per ICSB requirements detailed in charter school application) | $ 7,718 | Annual network allocation of insurance costs |
| Travel | $ 8,400 | |
| Postage | $ 2,800 | |
| Special Education Services | $ 10,000 | |

| | | |
|---|---|---|
| Student Information Services | $ 15,000 | Projected network allocation of information system maintenance costs |
| Food service | | |
| Transportation | $ 25,500 | $85 per student for transportation assistance |
| Nursing Services | | |
| INIS Fees | $ 300,000 | |
| Security services | $ 40,800 | Securitas fees |
| Equipment lease | $ 5,500 | copier lease |
| Food purchases/meals | $ 2,500 | ***$500 per term*** |
| **Total Professional Purchased or Contracted Services** | $ 467,618 | |
| | | |
| **Facilities** | | |
| Rent, mortgage, or other facility cost | $ 120,000 | Targeted rental facility of 20,000 square ft. at $6 per square foot, annually |
| Furniture & Equipment | $ 5,000 | |
| Gas/electric | $ 30,000 | Assuming $2,500 per month based on figures from a comparable school |
| Water/ Sewer | $ 12,000 | Assuming $1,000 per month based on figures from a comparable school |
| Grounds Keeping | | included in rent |
| Maintenance Services | $ 15,000 | |
| Custodial | $ 48,000 | contracted services at $4,000 per month |
| Waste disposal | | included in rent |
| Debt Service for Facilities (Interest Only) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Facilities** | $ 230,000 | |
| | | |
| **Other** | | |
| Contingency | | |
| Indiana Charter School Board Administrative Fee | $ 20,250 | **Assume 1% of Basic Grant (Row 6).** |
| CMO/EMO Fee | | **Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.** |
| Charter and Innovation Network School Advance Program Interest Costs | | |
| Escrow account for dissillusionment / closure | | **Schools are required to maintain an account in reserve to cover expenses for school closing. $10,000 should be placed in reserve starting in year 2 with a balance of $30,000 by year 4.** |
| Other (please describe) | | |
| Other (please describe) | | |
| **Total Other** | $ 20,250 | |
| | | |
| **Total Expenditures** | $ 1,971,272 | |
| **Carryover/Deficit** | $ 94,728 | |

Cumulative Carryover/(Deficit)

**The Excel Center - Muncie Staffing Needs -- Year 5**

**Please fill in the expected positions along with salary and benefit extimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

| Position Description | Number of Staff Per Position | Average Salary for the Position | Total Salary | Benefits and Payroll Taxes | TOTAL Salary and Benefits |
|---|---|---|---|---|---|
| School Director | 1 | 74,500 | 74,500 | 25,330 | 99,830 |
| Instructor/Teacher | 7 | 46,350 | 324,450 | 110,313 | 434,763 |
| Lead Instructor | 1 | 46,350 | 46,350 | 15,759 | 62,109 |
| Coach | 3 | 42,060 | 126,180 | 42,901 | 169,081 |
| College and Career Readiness Specialist | 1 | 42,060 | 42,060 | 14,300 | 56,360 |
| Lead Coach | 1 | 42,060 | 42,060 | 14,300 | 56,360 |
| Manager, Office Administrator | 1 | 42,440 | 42,440 | 14,430 | 56,870 |
| Drop-In Center Manager | 1 | 35,010 | 35,010 | 11,903 | 46,913 |
| Drop-In Center Attendant | 2 | 22,060 | 44,120 | 15,001 | 59,121 |
| Excel Center Network Director | 0.08 | 117,595 | 9,800 | 3,332 | 13,131 |
| Project Manager | 0.33 | 63,000 | 21,000 | 7,140 | 28,140 |
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| **TOTAL** | | | 807,970 | 274,710 | 1,082,679 |

# Goodwill Education Initiatives Inc

## 5-Year Budget

### The Excel Center Network

| | | | | | |
|---|---|---|---|---|---|
| **Student Count:** | 3,610 | 3,910 | 4,210 | 4,210 | 4,210 |
| **Per student funding:** | $ 6,750 | $ 6,750 | $ 6,750 | $ 6,750 | $ 6,750 |

| | 2017-2018 Budget | 2018-2019 Budget | 2019-2020 Budget | 2020-2021 Budget | 2021-2022 Budget |
|---|---|---|---|---|---|
| REVENUE | | | | | |
| State Funding | $24,367,500.00 | $26,392,500.00 | $28,417,500.00 | $28,417,500.00 | $28,417,500.00 |
| Federal Funding | $350,000.00 | $350,000.00 | $350,000.00 | $350,000.00 | $350,000.00 |
| TOTAL REVENUE | $24,717,500.00 | $26,742,500.00 | $28,767,500.00 | $28,767,500.00 | $28,767,500.00 |
| EXPENSES | | | | | |
| Wages/Benefits | | | | | |
| Salary and Wage | $9,503,000.00 | $10,293,000.00 | $11,083,000.00 | $11,083,000.00 | $11,083,000.00 |
| Payroll Taxes | $727,000.00 | $787,000.00 | $848,000.00 | $848,000.00 | $848,000.00 |
| Group Insurance | $1,711,000.00 | $1,853,000.00 | $1,995,000.00 | $1,995,000.00 | $1,995,000.00 |
| Retirement | $855,000.00 | $926,000.00 | $997,000.00 | $997,000.00 | $997,000.00 |
| Other Benefits | $480,000.00 | $520,000.00 | $560,000.00 | $560,000.00 | $560,000.00 |
| Total Wages/Benefits | $13,276,000.00 | $14,379,000.00 | $15,483,000.00 | $15,483,000.00 | $15,483,000.00 |
| Professional Fees | | | | | |
| Instructional Services, Dual Credit/Certification | $256,000.00 | $276,000.00 | $296,000.00 | $296,000.00 | $296,000.00 |
| SPED Services | $100,000.00 | $110,000.00 | $120,000.00 | $120,000.00 | $120,000.00 |
| Tutors | $25,000.00 | $27,500.00 | $30,000.00 | $30,000.00 | $30,000.00 |
| Staff Training | $90,000.00 | $97,500.00 | $105,000.00 | $105,000.00 | $105,000.00 |
| Technology Services (help desk) | $15,000.00 | $16,000.00 | $17,000.00 | $18,000.00 | $19,000.00 |
| Internet Access | $43,200.00 | $46,800.00 | $50,400.00 | $50,400.00 | $50,400.00 |
| Legal Fees | $60,000.00 | $130,000.00 | $70,000.00 | $168,000.00 | $70,000.00 |
| Marketing Expense | $180,000.00 | $195,000.00 | $210,000.00 | $210,000.00 | $210,000.00 |
| Admin Professional Services | $42,000.00 | $45,500.00 | $49,000.00 | $49,000.00 | $49,000.00 |
| INIS Fees | $3,225,000.00 | $3,525,000.00 | $3,825,000.00 | $3,825,000.00 | $3,825,000.00 |
| Employee Background Checks | $9,600.00 | $10,400.00 | $11,200.00 | $11,200.00 | $11,200.00 |
| Authorizer Fees | $243,675.00 | $263,925.00 | $284,175.00 | $284,175.00 | $284,175.00 |
| Security Services | $300,000.00 | $340,000.00 | $380,000.00 | $380,000.00 | $380,000.00 |
| Total Professional Fees | $4,589,475.00 | $5,083,625.00 | $5,447,775.00 | $5,546,775.00 | $5,449,775.00 |
| Supplies and Materials | | | | | |
| Classroom Supplies | $72,000.00 | $79,950.00 | $86,100.00 | $86,100.00 | $86,100.00 |
| Student Incentives | $36,100.00 | $39,100.00 | $42,100.00 | $42,100.00 | $42,100.00 |
| Textbooks | $36,000.00 | $39,000.00 | $42,000.00 | $42,000.00 | $42,000.00 |
| Software Licenses | $240,000.00 | $260,000.00 | $280,000.00 | $280,000.00 | $280,000.00 |
| Postage | $18,000.00 | $19,500.00 | $21,000.00 | $21,000.00 | $21,000.00 |
| Printing/Copying | $72,000.00 | $84,500.00 | $98,000.00 | $98,000.00 | $98,000.00 |
| Office Supplies | $72,000.00 | $78,000.00 | $84,000.00 | $84,000.00 | $84,000.00 |
| Dues and Fees | $12,000.00 | $13,000.00 | $14,000.00 | $14,000.00 | $14,000.00 |
| Misc Equipment | $60,000.00 | $65,000.00 | $70,000.00 | $70,000.00 | $70,000.00 |
| Total Supplies and Materials | $618,100.00 | $678,050.00 | $737,200.00 | $737,200.00 | $737,200.00 |
| Student Transportation | $240,000.00 | $260,000.00 | $280,000.00 | $280,000.00 | $280,000.00 |
| Drop-In Center | | | | | |
| Supplies | $30,000.00 | $33,000.00 | $33,000.00 | $34,000.00 | $35,000.00 |
| Total Drop-In Center | $30,000.00 | $33,000.00 | $33,000.00 | $34,000.00 | $35,000.00 |
| Occupancy | | | | | |
| Rent | $1,690,000.00 | $1,800,000.00 | $1,805,000.00 | $1,815,000.00 | $1,835,000.00 |
| Building Maintenance | $120,000.00 | $130,000.00 | $140,000.00 | $140,000.00 | $140,000.00 |
| Utilities | $500,000.00 | $575,000.00 | $654,000.00 | $687,000.00 | $721,000.00 |
| Trash Removal | $5,000.00 | $6,000.00 | $7,000.00 | $7,000.00 | $7,000.00 |
| Janitorial Services | $370,000.00 | $410,000.00 | $450,000.00 | $450,000.00 | $450,000.00 |

| | | | | | |
|---|---|---|---|---|---|
| Building/Janitorial Supplies | $30,000.00 | $32,500.00 | $35,000.00 | $35,000.00 | $35,000.00 |
| Grounds Maintenance | $20,000.00 | $21,000.00 | $22,000.00 | $23,000.00 | $24,000.00 |
| Property Tax Expense | $80,000.00 | $84,000.00 | $88,000.00 | $92,000.00 | $97,000.00 |
| Total Occupancy | $2,815,000.00 | $3,058,500.00 | $3,201,000.00 | $3,249,000.00 | $3,309,000.00 |
| Depreciation | $1,560,000.00 | $1,690,000.00 | $1,820,000.00 | $1,820,000.00 | $1,820,000.00 |
| Other Expenses | | | | | |
| Travel Reimbursements | $18,000.00 | $26,000.00 | $35,000.00 | $35,000.00 | $35,000.00 |
| Telephone | $75,600.00 | $81,900.00 | $81,900.00 | $81,900.00 | $81,900.00 |
| Liability Insurance | $84,000.00 | $95,550.00 | $102,900.00 | $108,000.00 | $113,000.00 |
| Food Purchases/Meals | $36,000.00 | $39,000.00 | $42,000.00 | $42,000.00 | $42,000.00 |
| Barrier Removal/Student Assistance | $43,320.00 | $46,920.00 | $50,520.00 | $50,520.00 | $50,520.00 |
| Equipment Lease | $66,000.00 | $71,500.00 | $77,000.00 | $77,000.00 | $77,000.00 |
| Total Other Expenses | $322,920.00 | $360,870.00 | $389,320.00 | $394,420.00 | $399,420.00 |
| TOTAL EXPENSES | $23,451,495.00 | $25,543,045.00 | $27,391,295.00 | $27,544,395.00 | $27,513,395.00 |
| **NET SURPLUS/(DEFICIT)** | **$1,266,005.00** | **$1,199,455.00** | **$1,376,205.00** | **$1,223,105.00** | **$1,254,105.00** |
| | 5.12% | 4.49% | 4.78% | 4.25% | 4.36% |

**State Funding:**

Our assumption includes the per student funding will increase to $6,750 in 2017/2018 (the current funding request is $6,900 per student).

**Federal Funding:**

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

**Inflation:**

Certain expenses are projected to increase annually due to inflation. The budget model assumes an average 2.5% increase per annum.

**Salaries/Wages:**

Our salaries/wages (before taxes and benefits) will have a ceiling of 39% of Adult Learners funding across the Excel network. The attrition of staff each year has historically created savings which are used to provide adjustments to continuing staff.

**Professional Fees:**

Average expenditures across each charter were used to develop the 5-year projection. Expenses, such as internet, were budgeted at full cost rather than the discounted e-rate expense. Legal Fees are higher every two-years in relation to additional lobbying expenditures.

**Depreciation:**

Depreciation averages $100k per month with 11 Excel Centers ($110k annually per school). With some upcoming capital purchases we have assumed that depreciation, per site, will average $130k each year.

**Rent and Occupancy:**

The lease renewals with 5% rent escalations, upon renewal, are factored into the rental expense budget. In addition, the two potential new sites were budgeted with rents comparable to similar sized schools.

Property taxes - two of our facilities incur real estate property taxes. We have assumed 5% increases on the assessed values each year.

| | 2017-2018 Budget | 2018-2019 Budget | 2019-2020 Budget | 2020-2021 Budget | 2021-2022 Budget | INIS Fee | INIS Fee |
|---|---|---|---|---|---|---|---|
| Michigan St. | 345 | 345 | 345 | 345 | 345 | $ 300,000 | |
| Meadows | 345 | 345 | 345 | 345 | 345 | $ 300,000 | |
| Franklin Rd. | 345 | 345 | 345 | 345 | 345 | $ 300,000 | |
| Anderson | 300 | 300 | 300 | 300 | 300 | $ 300,000 | |
| Kokomo | 340 | 340 | 340 | 340 | 340 | $ 300,000 | |
| Lafayette | 305 | 305 | 305 | 305 | 305 | $ 300,000 | |
| Richmond | 280 | 280 | 280 | 280 | 280 | $ 300,000 | |
| West | 360 | 360 | 360 | 360 | 360 | $ 300,000 | |
| Noblesville | 215 | 215 | 215 | 215 | 215 | $ 175,000 | |
| University Heights | 360 | 360 | 360 | 360 | 360 | $ 300,000 | |
| Shelbyville | 115 | 115 | 115 | 115 | 115 | $ 50,000 | |
| Clarksville | 300 | 300 | 300 | 300 | 300 | $ 300,000 | |
| New Location (18/19) | | 300 | 300 | 300 | 300 | | $300,000 |
| New Location (19/20) | | | 300 | 300 | 300 | | $300,000 |
| **Total** | **3,610** | **3,910** | **4,210** | **4,210** | **4,210** | $ 3,225,000 | |

**Attachment 19 – Budget Narrative**

**<u>YEAR 0</u>**

**I. REVENUE**

**State Revenue**

None.

**Federal Revenue**

None.

**Other Revenues**

*Excel Center Network Transfers*: In Year 0, GEI plans to use funds from within the existing Excel Center network to cover start-up costs associated with school opening. These transfers are projected to begin in March prior to school opening and total $325,607.

**II. EXPENDITURES**

**Personnel Expenses**

*Wages, Benefits, and Payroll Taxes*: Assumes a School Director will begin in March prior to school opening, a Lead Instructor, Lead Coach, and Office Administrator – Manager will begin in April prior to school opening, and remaining Instructors, Coaches, a College and Career Readiness Specialist, and Drop-In Center Manager will begin in June prior to school opening. Expenditures are projected to be prorated across this timeline, based on average salaries for each position.

**Instructional Supplies and Resources**

*Technology*: Technology expenditures in Year 0 include administrative software, network infrastructure, etc.
*Computers*: Costs for computers include student computers, including computer labs and carts on wheels.

**Support Supplies and Resources**

*Administrative Computers*: Assumes each staff member has a computer.
*Office Supplies*: Assumes general costs for paper, pens, pencils, folder, staples, etc.
*Student Recruitment and Materials*: Student recruitment is anticipated to being in April. Assumed costs are associated with flyers and other printed materials to assist with student recruitment activities, based on prior experience.

**Board Expenses**

None.

**Professional Purchased or Contracted Services**

*Legal Services*: Costs are projected at $350 per month, beginning 2 months prior to school opening. Legal costs relate to start-up expenditures and general allocation across the Excel Center network.
*Travel*: Travel includes reimbursable mileage related to staff travel for professional development, meetings, and other school-related activities.
*Postage*: Costs include direct student mailings for purposes of student recruitment and informing students of upcoming important dates and information regarding the school.

**Facilities**

*Rent, mortgage, or other facility cost*: Rent and facility costs will not begin until July 1 of the year of school opening.

**Other**

None.

**<u>YEARS 1 – 5</u>**

**SCHOOL ENROLLMENT PROJECTIONS**: Each of the proposed Excel Centers contained in this charter application anticipating opening the school in Year 1 with 300 students and maintaining and enrollment of 500 students in subsequent years.

**I. REVENUE**

**State Revenue**

*Basic Grant*: Current line items in Indiana's state budget provides $6,600 per Adult Learner Student. During the 2017 legislative Budget Session, stakeholders are exploring increasing this per pupil allotment. For conservative budgeting purposes, Basic Grant revenues are being projected at $6,750 per Adult Learner Student; however, the actual per pupil allotment is expected to be greater.

**Federal Revenue**

*Public Law 101-476 (IDEA)*: For conservative budgeting purposes, IDEA revenues assume a half year of spending against a total aware of approximately $41,000 which is comparable to that of a similar Excel Center with 300 students. In Years 2 – 5, the full $41,000 award is assumed.

**Other Revenues**

None.

**II. EXPENDITURES**

**Personnel Expenses**

*Wages, Benefits, and Payroll Taxes*: In Year 1, Staffing includes: 1 School Director; 7 Instructors; 1 Lead Instructor; 2 Coaches; 1 Lead Coach; 1 College and Career Readiness Specialist; 1 Office Administrator – Manager; 1 Drop-In Center Manager; 2 Drop-In Center Attendants. Personnel expenses also assume that each school will pay for a small portion of Senior Director of The Excel Center Network of Operations and a Project Manager which supports overall school operations. All salaries are based on GEI's average salary for each position and each year after Year 0 assumes small wage increase calculated at 1.03%. Benefits and Payroll Taxes are calculated at 34% of Wages. *Professional Development*: Due to operational network efficiencies, it is anticipated that all schools will absorb costs related to professional development. As such, professional development expenses are conservatively estimated at 10,000.

*Bonuses*: Assumes that some staff members may be eligible for small, merit bonuses.

*Tuition Reimbursement*: Assumes that staff members may take advantage of GEI's tuition reimbursement so long as they meet the qualification and conditions set forth in GEI's Tuition Reimbursement Policy.

*Staff Stipends*: Staff stipends for school-related activities are estimated at $11,500.

**Instructional Supplies and Resources**

*Textbooks*: Although The Excel Center uses minimal textbooks, textbooks are budgeted for as a means to provide supplemental texts and reading.
*Technology*: All instructional technology purchases were incurred prior to opening.
*Assessment materials*: Assessment materials for diagnostic and formative assessments are estimated at $10,000 based on prior experience.
*Computers*: Costs include student laptops and PCs.
*Software*: Costs include curriculum and remediation software.
*Other classroom supplies*: Other classroom supplies are various in nature and depend on those course and level of the subject being taught. Costs are estimated at $5,000 for Term 1 and $1,000 each subsequent term.
*Graduation*: Graduation costs include caps, gowns, and other rentals needed to host the graduation ceremony.
*Student Certifications and Dual Credit Courses*: All students are strongly encouraged to participate in certification or dual credit prior to graduation. The Excel Center assumes all costs associated with certifications or dual credits. Based on costs from other Excel Centers across GEI's network, these expenses are estimated at $20,000 in Year 1. Due to the increased number of students prepared to take certification and dual credit courses, these costs are expected to increase each year and are reflected, as such, in the budget.

**Support Supplies and Resources**

*Administrative Computers*: All staff computers are purchased during the pre-opening period. Additional and replacement computers are budgeted in years 2-5 at $3,000 each.
*Administration Dues, Fees, Misc. Expenses*: Includes association membership dues, chamber of commerce, or other organizational fees.
*Office Supplies*: Basic office supplies are estimated at $4,000 based on prior experience.
*Student Recruitment and Materials*: Assumed costs are associated with flyers and other printed materials to assist with student recruitment activities, based on prior experience.
*Drop-In Center Supplies*: Expenses include general supplies and equipment purchases.
*Student Barrier Removal Support*: Expenses include costs associated with removing the basic barriers that stand in the way for students to attend school. Specific allocations will vary greatly based on student need. Overall expenses are calculated at $10 per student based on prior experience.

**Board Expenses**

*Charter Board Services, including Board Training, Retreats*: Included in INIS fees.
*Charter Board Supplies & Equipment*: Included in INIS fees.
*Charter Board Dues, Fees, etc*.: Included in INIS fees

**Professional Purchased or Contracted Services**

*Legal Services*: Legal services are estimated at $4,200 based on prior experience.
*Audit Services*: Included in INIS fees.
*Payroll Services*: Included in INIS fees
*Accounting Services*: Included in INIS fees.
*Printing/Newsletter/Annual Report Services*: Expenses estimated at $5,000 based on prior experience.
*Internet Services*: Costs include Internet and telephone.

*Total Insurance Costs*: $7,000 is GEI's allocation of insurance costs per school in its network.
*Travel*: Travel includes reimbursable mileage related to staff travel for professional development, meetings, and other school-related activities.
*Postage*: Costs include direct student mailings for purposes of student recruitment and informing students of upcoming important dates and information regarding the school.
*Special Education Services*: Expenses are projected based on prior experience operating The Excel Center and include any contracted service as required by a student's IEP or Section 504 Plan that is not generally provided directly by the school.
*Student Information System*: Expenses include the per-school allocation for the acquisition and setup of a new student information system.
*Transportation*: Expenses are calculated at $75 per student to cover the cost of bus passes, gas card reimbursement, or other means used to ensure students have transportation to and from the school.
*INIS Fees*: The Indiana Network of Independent Schools (INIS) is a Limited Liability Corporation (LLC) whose sole member is GEI. INIS provides services to charter schools across Indiana, including all schools operated by GEI. Each school in GEI's network pays a fee to INIS which includes: Charter Board Services (including trainings and retreats); Board Supplies & Equipment; Board Dues & Fees; Audit Services; Payroll Services; and Accounting Services.
*Security Services*: GEI contracts with Securitas to provide a security guard at each Excel Center.
*Equipment Lease*: Expenses include the lease of a copier.
*Food Purchases/Meals*: Expenses are budgeted at $500 per term.

**Facilities**

*Rent, Mortgage, or Other Facility Cost*: The Excel Center targets a rental facility of approximately 20,000 square feet at $6 per square foot, annually.
*Furniture & Equipment*: Costs are estimated at $50,000 based on prior experience and vendor quotes.
*Gas/Electric*: Costs assume $2,500 per month based on figures from a comparable school.
*Water/Sewer*: Costs assume $1,000 per month based on figures from a comparable school.
*Grounds Keeping*: Costs associated with grounds keeping are included in rent.
*Maintenance Services*: Costs are estimated at $15,000 based on historical experience.
*Custodial*: GEI will contract for custodial services at an expected cost of $4,000 per month.
*Waste Disposal*: Costs associated with waste disposal are included in rent.

**Other**

*Indiana Charter School Board Administrative Fee*: Assumes 1% of Basic Grant.

**FIVE-YEAR NETWORK BUDGET**

The provided five-year budget is the same five-year budget that was submitted for The Excel Center – Anderson's charter renewal. This budget conservatively reflects who new locations after the opening of The Excel Center – Clarksville. GEI ensures that financial solvency of all schools that operates and proposes to operate. Updated budgets will be submitted, as required by ICSB, with each charter activation as a result of this charter application.

**Attachment 20 – Existing Organizer Financials**

This attachment contains:

- The last three years of audited financial statements and management letters
    - 2016
    - 2015
    - 2014
- Most recent internal balance sheet
- Most recent internal income statement

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To the Finance and Audit Committees of Goodwill Industries of Central Indiana, Inc.
and subsidiaries and the Board of Directors of Goodwill Industries Foundation
of Central Indiana, Inc.:

In planning and performing our audit of the financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries and Goodwill Industries Foundation of Central Indiana, Inc. (collectively referred to as the Organizations) as of and for the year ended December 31, 2016, in accordance with auditing standards generally accepted in the United States of America, we considered the Organizations' internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organizations' internal control. Accordingly, we do not express an opinion on the effectiveness of the Organizations' internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the Organizations' financial statements will not be prevented, or detected and corrected, on a timely basis.

Our consideration of internal control was for the limited purpose described in paragraph one above and was not designed to identify all deficiencies in internal control that might be deficiencies, significant deficiencies, and material weaknesses and, therefore, deficiencies, significant deficiencies, or material weaknesses may exist that were not identified. We did not identify any deficiencies in internal control that we consider to be material weaknesses, as defined above.

This communication is intended solely for the information and use of management, Finance and Audit Committee and Boards of Directors, others within the Organization, and is not intended to be and should not be used by anyone other than these specified parties.

Greenwalt CPAs, Inc.

March 02, 2017

# GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED FINANCIAL STATEMENTS

Together with Independent Auditors' Report

DECEMBER 31, 2016 AND JANUARY 02, 2016

GREENWALT CPAs

We Deliver Peace of Mind

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GREENWALT CPAs

# Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

## Report on the Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of Goodwill Industries of Central Indiana, Inc. (an Indiana not-for-profit organization) and subsidiaries (Goodwill), which comprise the consolidated statement of financial position as of December 31, 2016, and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and related notes to the consolidated financial statements.

## Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

## Auditors' Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the consolidated financial position of Goodwill as of December 31, 2016, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

## Report on Summarized Comparative Information

We have previously audited Goodwill's January 02, 2016 consolidated financial statements, and we expressed an unmodified audit opinion on those consolidated financial statements in our report dated February 23, 2016. In our opinion, the summarized comparative information presented herein as of and for the year ended January 02, 2016, is consistent, in all material respects, with the audited consolidated financial statements from which it has been derived.

## Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

## Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated March 02, 2017, on our consideration of Goodwill's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill's internal control over financial reporting and compliance.

Greenwalt CPAs, Inc.

March 02, 2017

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES
CONSOLIDATED STATEMENT OF FINANCIAL POSITION
DECEMBER 31, 2016 WITH SUMMARIZED COMPARATIVE INFORMATION AS OF JANUARY 02, 2016

| ASSETS | Unrestricted | Temporarily Restricted | Eliminations | Totals December 31, 2016 | Totals January 02, 2016 |
|---|---|---|---|---|---|
| **CURRENT ASSETS** | | | | | |
| Cash and cash equivalents | $ 10,414,242 | $ 305,732 | $ - | $ 10,719,974 | $ 8,418,497 |
| Trade accounts receivable, net | 6,167,713 | - | - | 6,167,713 | 6,288,628 |
| Contributions receivable | 1,124,228 | 8,875,772 | - | 10,000,000 | - |
| Other receivables, net | 523,015 | - | - | 523,015 | 625,114 |
| Inventories | 5,115,749 | - | - | 5,115,749 | 4,449,594 |
| Prepayments | 1,531,493 | - | - | 1,531,493 | 1,705,455 |
| Due from other funds | - | 10,878 | (10,878) | - | - |
| *Total current assets* | 24,876,440 | 9,192,382 | (10,878) | 34,057,944 | 21,487,288 |
| **LONG-TERM ASSETS** | | | | | |
| Land and improvements | 13,580,545 | - | - | 13,580,545 | 13,580,545 |
| Buildings and improvements | 47,517,253 | - | - | 47,517,253 | 45,955,307 |
| Equipment | 37,893,255 | - | - | 37,893,255 | 36,388,164 |
| Projects in progress | 531,395 | - | - | 531,395 | 814,112 |
| | 99,522,448 | - | - | 99,522,448 | 96,738,128 |
| Accumulated depreciation | (45,653,752) | - | - | (45,653,752) | (41,843,850) |
| *Net property and equipment* | 53,868,696 | - | - | 53,868,696 | 54,894,278 |
| Investments | 3,092,756 | - | - | 3,092,756 | 3,446,329 |
| Deposits | 80,000 | - | - | 80,000 | 53,548 |
| *Total long-term assets* | 57,041,452 | - | - | 57,041,452 | 58,394,155 |
| *Total assets* | $ 81,917,892 | $ 9,192,382 | $ (10,878) | $ 91,099,396 | $ 79,881,443 |
| **LIABILITIES AND NET ASSETS** | | | | | |
| **CURRENT LIABILITIES** | | | | | |
| Bank line of credit | $ 3,895,000 | $ - | $ - | $ 3,895,000 | $ 2,150,000 |
| Current portion of bonds and notes payable | 1,125,000 | - | - | 1,125,000 | 1,883,145 |
| Accounts payable | 5,934,940 | - | - | 5,934,940 | 6,030,599 |
| Accrued liabilities | 5,546,803 | - | - | 5,546,803 | 4,152,168 |
| Due to other funds | 10,878 | - | (10,878) | - | - |
| *Total current liabilities* | 16,512,621 | - | (10,878) | 16,501,743 | 14,215,912 |
| **LONG-TERM LIABILITIES** | | | | | |
| Bonds and notes payable, net of deferred bond costs of $119,283 at December 31, 2016 and $129,157 at January 2, 2016 | 14,980,717 | - | - | 14,980,717 | 15,681,552 |
| Other long-term liabilities | 134,538 | - | - | 134,538 | 288,125 |
| *Total long-term liabilities* | 15,115,255 | - | - | 15,115,255 | 15,969,677 |
| *Total liabilities* | 31,627,876 | - | (10,878) | 31,616,998 | 30,185,589 |
| **COMMITMENTS AND CONTINGENCIES (NOTES 7, 8, 10, 13 AND 14)** | | | | | |
| **NET ASSETS** | 50,290,016 | 9,192,382 | - | 59,482,398 | 49,695,854 |
| *Total liabilities and net assets* | $ 81,917,892 | $ 9,192,382 | $ (10,878) | $ 91,099,396 | $ 79,881,443 |

See accompanying notes to consolidated financial statements.

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED DECEMBER 31, 2016

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED JANUARY 02, 2016

| | | | Totals | |
|---|---|---|---|---|
| | Unrestricted | Temporarily Restricted | December 31, 2016 | January 02, 2016 |
| **REVENUE** | | | | |
| Sales - donated goods | $ 80,864,419 | $ - | $ 80,864,419 | $ 78,712,597 |
| Sales - purchased goods | 43,543 | - | 43,543 | 133,718 |
| Commercial services | 16,644,033 | - | 16,644,033 | 17,449,840 |
| Mission advancement | 7,455,154 | - | 7,455,154 | 6,954,313 |
| Education services | 26,288,451 | 282,532 | 26,570,983 | 27,401,256 |
| Interest and dividend income | 51,641 | - | 51,641 | 48,822 |
| Realized loss on investments | (3,473) | - | (3,473) | (143) |
| Unrealized loss on investments | (2,952) | - | (2,952) | (8,645) |
| Net loss on disposition of property | (1,922) | - | (1,922) | (33,905) |
| Gain on interest rate swap hedge | 110,480 | - | 110,480 | 122,123 |
| Other, net | 1,461,116 | - | 1,461,116 | 1,088,071 |
| *Total revenue* | 132,910,490 | 282,532 | 133,193,022 | 131,868,047 |
| **SUPPORT** | | | | |
| United Way of Central Indiana, Inc. allocation | 373,415 | - | 373,415 | 377,723 |
| Annual and capital campaign contributions | 13,880 | - | 13,880 | 11,226 |
| Other contributions | 2,910,223 | 8,875,772 | 11,785,995 | 1,744,591 |
| *Total support* | 3,297,518 | 8,875,772 | 12,173,290 | 2,133,540 |
| **NET ASSETS RELEASED FROM RESTRICTIONS** | 222,358 | (222,358) | - | - |
| *Total revenue and support* | 136,430,366 | 8,935,946 | 145,366,312 | 134,001,587 |
| **EXPENSES** | | | | |
| Retail and commercial services | 86,838,743 | - | 86,838,743 | 81,749,906 |
| Mission advancement | 8,727,415 | - | 8,727,415 | 8,576,964 |
| Education services | 24,655,044 | - | 24,655,044 | 25,657,380 |
| General and administrative | 14,612,514 | - | 14,612,514 | 14,673,354 |
| Fundraising | 746,052 | - | 746,052 | 734,023 |
| *Total expenses* | 135,579,768 | - | 135,579,768 | 131,391,627 |
| **CHANGE IN NET ASSETS** | 850,598 | 8,935,946 | 9,786,544 | 2,609,960 |
| **NET ASSETS, BEGINNING OF YEAR** | 49,439,418 | 256,436 | 49,695,854 | 47,085,894 |
| **NET ASSETS, END OF YEAR** | $ 50,290,016 | $ 9,192,382 | $ 59,482,398 | $ 49,695,854 |

See accompanying notes to consolidated financial statements.

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

FOR THE YEAR ENDED DECEMBER 31, 2016

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED JANUARY 02, 2016

| | Retail and Commercial Services | Mission Advancement | Education Services | General and Administrative | Fundraising | Totals | |
|---|---|---|---|---|---|---|---|
| | | | | | | December 31, 2016 | January 02, 2016 |
| Salaries and wages | $ 36,096,484 | $ 6,117,401 | $ 12,757,536 | $ 6,892,709 | $ 521,940 | $ 62,386,070 | $ 60,590,697 |
| Employee benefits | 8,852,082 | 1,196,435 | 4,101,412 | 1,538,811 | 94,690 | 15,783,430 | 15,385,016 |
| Professional services | 4,129,465 | 331,798 | 1,740,131 | 1,744,193 | 21,923 | 7,967,510 | 7,003,455 |
| Supplies | 4,764,314 | 112,833 | 586,182 | 1,018,288 | 22,016 | 6,503,633 | 5,540,846 |
| Cost of sales | 7,313,161 | - | - | - | - | 7,313,161 | 7,292,609 |
| Occupancy | 18,764,686 | 506,769 | 2,128,796 | 1,978,551 | 31,537 | 23,410,339 | 21,389,104 |
| Advertising and printing | 886,231 | 12,501 | 105,002 | 318,619 | 5,504 | 1,327,857 | 1,851,668 |
| Travel and transportation | 1,505,966 | 259,238 | 281,022 | 267,805 | 28,740 | 2,342,771 | 2,424,121 |
| Staff development | 36,336 | 35,399 | 53,332 | 78,929 | 5,122 | 209,118 | 276,142 |
| Memberships and dues | 13,497 | 3,736 | 19,602 | 207,111 | 1,524 | 245,470 | 236,127 |
| Client tuition, training and assistance | 59,214 | 81,975 | - | - | - | 141,189 | 79,644 |
| Student services | - | - | 198,033 | - | - | 198,033 | 1,724,622 |
| Depreciation and amortization | 3,583,683 | 67,784 | 2,100,931 | 466,295 | 4,380 | 6,223,073 | 6,324,278 |
| Bad debt expense | 231,833 | - | 12,048 | - | - | 243,881 | 145,563 |
| Interest expense | 314,330 | - | 120,671 | 82,442 | - | 517,443 | 551,837 |
| Other | 287,461 | 1,546 | 450,346 | 18,761 | 8,676 | 766,790 | 575,898 |
| | $ 86,838,743 | $ 8,727,415 | $ 24,655,044 | $ 14,612,514 | $ 746,052 | $ 135,579,768 | $ 131,391,627 |

See accompanying notes to consolidated financial statements.

## NET CHANGE IN CASH AND CASH EQUIVALENTS

| | December 31, 2016 | January 02, 2016 |
|---|---|---|
| **CASH FLOWS FROM OPERATING ACTIVITIES** | | |
| Change in net assets | $ 9,786,544 | $ 2,609,960 |
| Depreciation and amortization | 6,223,073 | 6,324,278 |
| Gain on interest rate swap hedge | (110,480) | (122,123) |
| Realized loss on investments | 3,473 | 143 |
| Unrealized loss on investments | 2,952 | 8,645 |
| Net loss on disposition of property | 1,922 | 33,905 |
| *(Increase) decrease in operating assets:* | | |
| Trade accounts receivable, net | 120,915 | (1,551,988) |
| Contributions receivable | (10,000,000) | - |
| Other receivables, net | 102,099 | (125,564) |
| Inventories | (666,155) | (12,342) |
| Prepayments | 173,962 | (91,918) |
| Deposits | (26,452) | (28,548) |
| *Increase (decrease) in operating liabilities:* | | |
| Accounts payable and accrued liabilities | 1,298,976 | (554,475) |
| Other long-term liabilities | (43,107) | (43,108) |
| *Net cash provided by operating activities* | 6,867,722 | 6,446,865 |
| **CASH FLOWS FROM INVESTING ACTIVITIES** | | |
| Purchases of investments | (52,852) | (1,039,930) |
| Proceeds from sales of investments | 400,000 | 1,991,374 |
| Proceeds from sales of fixed assets | - | 52,275 |
| Capital expenditures | (5,199,413) | (6,044,368) |
| *Net cash used in investing activities* | (4,852,265) | (5,040,649) |
| **CASH FLOWS FROM FINANCING ACTIVITIES** | | |
| Borrowing on line of credit, net | 1,745,000 | 1,500,000 |
| Principal payments on bonds and notes payable | (1,458,980) | (534,252) |
| *Net cash provided by financing activities* | 286,020 | 965,748 |
| **INCREASE IN CASH AND CASH EQUIVALENTS** | 2,301,477 | 2,371,964 |
| **CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR** | 8,418,497 | 6,046,533 |
| **CASH AND CASH EQUIVALENTS, END OF YEAR** | $ 10,719,974 | $ 8,418,497 |
| **SUPPLEMENTAL CASH FLOWS INFORMATION** | | |
| Cash paid for interest | $ 419,107 | $ 455,790 |

See accompanying notes to consolidated financial statements.

## 1. Summary of Significant Accounting Policies

### Principles of Consolidation

These consolidated financial statements include the accounts of Goodwill Industries of Central Indiana, Inc. and its subsidiary companies. The term "Goodwill" used herein means Goodwill Industries of Central Indiana, Inc. and its subsidiaries, unless otherwise indicated by the context. All material inter-company accounts and transactions have been eliminated.

### Description of Organization

Goodwill Industries of Central Indiana, Inc. ("GICI") and its subsidiaries, GW Commercial Services, Inc. ("GWCS") and Goodwill Education Initiatives, Inc. ("GEI") (collectively referred to as "Goodwill") are Indiana non-profit organizations that offer employment, education, health, and related services to disadvantaged adults and young people throughout central Indiana. Goodwill defines disadvantaged individuals as those with a barrier to employment such as a disability, a criminal history and/or a low education level (less than a high school diploma).

GICI's Retail operation collects donations of used clothing and household items and sells them through a network of 56 thrift stores, four warehouse outlet centers and three vintage stores. Excess and unsalable donated items are sold through salvage and recycling channels. Unique items, jewelry and books are often sold through e-commerce channels. The Retail operation also accepts and sells donated automobiles, using a third party only for vehicle towing and auction services. The Retail operation employs nearly 2,400 individuals, more than 65% of whom have barriers to employment. These operations generate revenue and cash flow that fund a large portion of GICI's other mission-related operations and general and administrative expenses.

GICI's Commercial Services ("CS") operation provides a variety of outsource packaging, assembly and fulfillment services to external customers, employing over 200 people with disabilities and other barriers.

GWCS is operated under common management with GICI's Commercial Services operations and provides rehabilitative training and jobs for people who have significant disabilities, primarily through service contracts with various federal governmental entities pursuant to AbilityOne (formerly known as the Javits-Wagner-O'Day Act of 1971). AbilityOne requires certain federal governmental entities to purchase selected products and services, via such contracts, from non-profit agencies employing blind or significantly disabled individuals. GWCS operates 10 AbilityOne contracts at government sites in Indianapolis, Indiana and employs approximately 120 people with significant disabilities.

GICI's Mission Advancement ("MA") operation provides case management, counseling, training, education, job coaching, job placement and related supportive services, for disabled, disadvantaged, unemployed and under-employed individuals who wish to find and retain employment and increase their economic self-sufficiency. MA also manages programs designed to provide holistic whole-family services to Goodwill's low-wage workers and students, as well as to first-time expectant mothers and their families. The CS and MA segments of GICI are funded by a combination of contracts with external customers, service contracts with federal and state governmental entities, United Way grants, private grants and gifts from individuals and foundations, and subsidies from GICI's Retail operation.

## 1. Summary of Significant Accounting Policies, Continued

### Description of Organization, Continued

GEI provides educational opportunities designed to enable young people and adults to prepare for more productive lives. GEI operates public charter high schools in central Indiana under the provisions of the Indiana Charter School laws and the chartering authorities of the Mayor of Indianapolis and the Indiana Charter School Board. The following table provides more information regarding GEI's charter schools.

| School Name | School Location | Chartering Authority | Number of Years in Operation | Student Enrollment at December 31, 2016 |
|---|---|---|---|---|
| Indianapolis Metropolitan High School | Indianapolis, IN (at GICI headquarters facility) | Mayor of Indianapolis | 13 | 268 |
| The Excel Center for Adult Learners | Four locations in Indianapolis, IN, including one at GICI headquarters facility | Mayor of Indianapolis | 6 | 994 |
| The Excel Center-Anderson | Anderson, IN | Indiana Charter School Board | 5 | 296 |
| The Excel Center – Kokomo | Kokomo, IN | Indiana Charter School Board | 4 | 330 |
| The Excel Center – Lafayette | Lafayette, IN | Indiana Charter School Board | 4 | 296 |
| The Excel Center – Richmond | Richmond, IN | Indiana Charter School Board | 4 | 267 |
| The Excel Center – West | Indianapolis, IN | Mayor of Indianapolis | 4 | 378 |
| The Excel Center - University Heights | Indianapolis, IN | Mayor of Indianapolis | 2 | 373 |
| The Excel Center - Noblesville | Noblesville, IN | Indiana Charter School Board | 2 | 195 |
| The Excel Center - Shelbyville | Shelbyville, IN | Indiana Charter School Board | 1 | 67 |

## 1. Summary of Significant Accounting Policies, Continued

### Description of Organization, Continued

The schools contract with GICI for certain business support services, including marketing, human resources, finance, technology and facilities management. The schools receive the majority of their funding from the Indiana Department of Education. Their revenues are supplemented with funds from the United States Department of Education, private grants, gifts and support from GICI. Indianapolis Metropolitan High School (the Met) primarily serves at-risk students in grades 9-12.

The Excel Centers primarily serve adults who previously dropped out of high school and are seeking their high school diplomas rather than a GED.

Goodwill is a member of Goodwill Industries International, Inc. (GII). Goodwill operates autonomously and reports its financial results independent of GII or any other GII-affiliated entity. Goodwill operates in a geographic territory assigned to it by GII encompassing 28 counties in central Indiana.

Goodwill is a member agency of United Way of Central Indiana, Inc. In 2016 and 2015, Goodwill received United Way grants of $373,415 and $377,723, respectively.

### Basis of Accounting And Use of Estimates

The accompanying consolidated financial statements were prepared on the accrual basis of accounting. The preparation of consolidated financial statements in conformity with accounting principles generally accepted in the United States of America (GAAP) requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements and the reported amounts of support, revenues and expenses during the reporting period. Actual results could differ from those estimates. For annual financial reporting purposes, Goodwill utilizes a 52-week period ending on the Saturday closest to December 31.

### Summarized Comparative Information

The financial statements include certain prior year summarized comparative information in total, but not by net asset class and functional expense class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP. Accordingly, such information should be read in conjunction with Goodwill's financial statements for the year ended January 02, 2016, from which the summarized information was derived.

### Cash and Cash Equivalents

Goodwill considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents. Goodwill maintains cash balances at commercial banks. Accounts at the banks are guaranteed by the Federal Deposit Insurance Corporation (FDIC) up to $250,000. At December 31, 2016, Goodwill maintained cash and cash equivalents in excess of the FDIC coverage limits.

## 1. Summary of Significant Accounting Policies, Continued

### Trade Accounts Receivable

Trade accounts receivable are unsecured customer obligations generally requiring payment within 30 days of the invoice date.

Accounts receivable are stated at the amount billed to the customer or at amounts determined by public statute. Generally, customer account balances with invoices dated over 30 days are considered delinquent.

Management individually reviews all accounts receivable balances that are past due, and based on an assessment of current creditworthiness and other factors, estimates the portion, if any, of the balance that will not be collected.

### Inventories

The retail store and e-commerce operations of Goodwill contain donated inventories. These items have little or no economic value to Goodwill when first received and therefore are not recorded at the time of donation. Donated goods are sold through retail store, e-commerce, salvage and recycling sales channels. Costs included in donated goods inventory include those incurred to collect, transport and process donated items to place them for sale in Goodwill's retail stores, e-commerce operations, or to salvage and recycling dealers. Retail store, e-commerce, recycling and salvage sales are reflected in the statement of activities as sales - donated goods.

Goodwill's commercial services operation has purchased inventories generally classified as raw material, work in process and finished goods. These inventories are valued in the financial statements at standard cost. Cost of sales is included in retail and commercial services expenses in the statement of functional expenses.

### Property and Equipment

Property and equipment are recorded at historical cost. Donated property is recorded at the estimated fair market value at the date of donation. Depreciation is computed on the straight-line method over estimated useful lives ranging from 10 to 30 years for buildings and building improvements, and from 3 to 10 years for equipment and other capital assets. Leasehold improvements are depreciated over a period of time not exceeding the life of the corresponding property lease. Material property additions and improvements are capitalized and expenditures for normal maintenance and repairs are expensed as incurred.

Goodwill accumulates certain costs for capital projects until the projects are placed in service, at which time they become depreciable fixed assets. Goodwill's statement of financial position reflected projects in progress totaling $531,395 and $814,112 at December 31, 2016 and January 02, 2016, respectively.

## 1. Summary of Significant Accounting Policies, Continued

### Net Assets

Goodwill maintains the following classifications of net assets:

Unrestricted

These include revenue and expenses from the regular operations of Goodwill, which are at the discretion of management and the Board of Directors.

Temporarily Restricted

These include contributions and grants with restrictions specified by the donors or grantors.

### Contributions

Contributions are recognized when the donor makes an unconditional promise to give to Goodwill and are recorded at their fair values as revenues and assets in the period promised. Contributions that are restricted by the donor are reported as increases in unrestricted net assets if the restrictions expire in the year in which the contributions are recognized. All other donor-restricted contributions are reported as increases in temporarily restricted net assets. When a restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets.

Contributions receivable of $10,000,000 at December 31, 2016 were due in less than one year.

### Expense Allocation

Expenses have been classified as retail and commercial services, mission advancement, education services, general and administrative, and fundraising. Goodwill uses actual direct expenditures and cost allocations, based on estimates of time and usage by Goodwill personnel and programs, to classify its expenses.

### Advertising

Advertising and printing expenses totaled $1,327,857 and $1,851,668 in 2016 and 2015, respectively. Goodwill's policy is to record advertising expenditures in the period in which they are incurred.

### Subsequent Events

Subsequent events have been considered through March 02, 2017, which was the date the financial statements were available to be issued. See Note 17.

## 2. Tax Status

Goodwill and its subsidiaries are Indiana not-for-profit corporations, exempt from income tax under Section 501(c)(3) of the U.S. Internal Revenue Code. However, if income was generated from certain activities not directly related to Goodwill's tax-exempt purposes, such income would be subject to taxation as unrelated business income. Goodwill and its subsidiaries are not considered private foundations as defined in Section 509(a) of the Internal Revenue Code.

## 3. Trade Accounts Receivable

Trade accounts receivable are summarized as follows:

| | December 31, 2016 | January 02, 2016 |
|---|---|---|
| Trade accounts receivable | $ 6,472,725 | $ 6,470,949 |
| Less – allowance for uncollectible accounts | (305,012) | (182,321) |
| Trade accounts receivable, net | $ 6,167,713 | $ 6,288,628 |

## 4. Inventories

Inventories are summarized as follows:

| | December 31, 2016 | January 02, 2016 |
|---|---|---|
| Donated goods | $ 4,126,585 | $ 3,700,418 |
| Purchased goods | 989,164 | 749,176 |
| | $ 5,115,749 | $ 4,449,594 |

## 5. Investments

Goodwill's investments in equity securities with readily determinable fair values and all investments in debt securities are stated at fair value in the statements of financial position (see Note 15). Realized and unrealized gains and losses are reported in the statement of activities.

Goodwill held the following investment securities at:

| | December 31, 2016 | January 02, 2016 |
|---|---|---|
| Mutual funds – market value | $ 3,092,756 | $ 3,446,329 |
| Mutual funds – cost basis | $ 3,114,524 | $ 3,466,396 |

## 6. Bonds and Notes Payable

a. Goodwill has a committed line of credit with a commercial bank, expiring September 2017. This line of credit provides for maximum borrowings of $5,000,000 and bears interest at one-month LIBOR plus 1.75% (a total of 2.47% at December 31, 2016). As of December 31, 2016 and January 02, 2016, Goodwill had $3,895,000 and $2,150,000, respectively, outstanding on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2016 and 2015, Goodwill paid $4,355 and $5,141, respectively, in non-use fees.

## 6. Bonds and Notes Payable, Continued

GEI has a line of credit with a commercial bank, which expires September 2017. This line of credit provides for maximum borrowings of $1,500,000 and bears interest at one-month LIBOR plus 1.75% (a total of 2.47% at December 31, 2016). As of December 31, 2016 and January 02, 2016, GEI had no outstanding balance on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2016 and 2015, GEI paid $1,706 and $4,192 in non-use fees. The GEI line of credit is guaranteed by Goodwill.

b. In December 2006, Goodwill issued $12 million of tax-exempt long-term bonds, the proceeds of which were used to build 2 new retail stores, refinance then-existing debt and remodel Goodwill's Indianapolis headquarters campus to accommodate new charter high school space and related ancillary facilities. The bonds bear interest at an adjustable interest rate and currently re-price every seven days based on market conditions. The interest rate approximates the quoted weekly Securities Industry and Financial Markets Association (SIFMA) Index rate. In 2016, the interest rate on the bonds ranged from 0.06% to 0.77%. Goodwill is required to make annual principal payments of $600,000, through 2026. The outstanding balance of the bonds payable at December 31, 2016 and January 02, 2016 was $6,600,000 and $7,200,000, respectively.

   Goodwill maintains a direct-pay letter of credit facility with a commercial bank that secures Goodwill's 2006 tax exempt bonds. Goodwill paid fees equal to 80 basis points in 2016 and 2015 to the bank to maintain the letter of credit. Goodwill paid letter of credit fees for the 2006 bonds of $54,235 and $43,624 in 2016 and 2015, respectively, which is included in interest expense on the statement of functional expenses.

   Goodwill also pays remarketing fees to a remarketing agent for the 2006 bonds, equal to 0.10% of the amount of bonds outstanding. Goodwill paid $11,188 and $7,253 of remarketing fees in 2016 and 2015, respectively.

c. In February 2014, Goodwill issued $10.5 million of tax-exempt bonds through the Indiana Finance Authority. The bonds have a 20-year term and have a 2.57% fixed interest rate for the first seven (7) years, through March 02, 2021. Goodwill made monthly interest payments beginning August 01, 2014 and monthly principal and interest payments beginning May 01, 2015. The bonds are held by a commercial bank for the first seven years, after which Goodwill has the right to refinance the then-outstanding principal, renegotiate the interest rate and/or place the bonds in the open market via a remarketing agent and trustee. The bonds are unrated and are not specifically secured by any collateral or credit enhancement vehicles. Proceeds of the bonds were used to finance construction of four retail stores and significant remodeling at Goodwill's Indianapolis headquarters facility. The outstanding balance of bonds payable under the 2014 issuance at December 31, 2016 and January 02, 2016 was $9,625,000 and $10,106,250, respectively.

d. In 2013, GEI opened four new Excel Centers and entered into operating leases for the locations. In two of the locations, tenant improvements were financed through notes payable to commercial banks. The notes required monthly principal and interest payments for five years, through 2018. The notes were paid-in-full during 2016.

## 6. Bonds and Notes Payable, Continued

e. Total interest expense as shown on the statement of functional expenses consists of the following:

| | 2016 | 2015 |
|---|---|---|
| Bond, notes payable and line of credit interest | $ 436,085 | $ 475,155 |
| Letter of credit fees | 54,235 | 50,222 |
| Remarketing fees | 11,188 | 7,253 |
| Bond amortization expenses | 9,874 | 9,874 |
| Line of credit non-use fees | 6,061 | 9,333 |
| Total interest expense | $ 517,443 | $ 551,837 |

f. Goodwill is party to an interest rate swap in order to manage interest rate risk on a portion of its bond debt, the notional amount of which was $3,347,500 at December 31, 2016. The swap agreement provides for Goodwill to pay a fixed interest rate of 3.85% for ten years in exchange for the underlying floating interest rate. At December 31, 2016 and January 02, 2016, the swap had a negative fair value of $57,111 and $167,591, respectively. The fair value of the swap is included in other long-term liabilities on the statement of financial position and the change in fair value from 2015 to 2016 is recorded as a gain on interest rate swap hedge on the statement of activities.

g. The aggregate maturities of long-term debt are as follows for the following fiscal years:

| | |
|---|---|
| 2017 | $ 1,125,000 |
| 2018 | 1,125,000 |
| 2019 | 1,125,000 |
| 2020 | 1,125,000 |
| 2021 | 1,125,000 |
| Thereafter | 10,600,000 |
| | $ 16,225,000 |

Pursuant to Accounting Standards update 2015-03, bond issuance costs are now presented within the bond payable balance. This was applied retrospectively in the presentation of the bonds payable balance as of December 31, 2016 and January 02, 2016. Bond issuance costs relating to the 2006 and 2014 bond issues have been recorded at cost and are being amortized using the straight-line method over the term of the bonds. Debt issuance costs of $119,283 and $129,157 were included with bonds payable at December 31, 2016 and January 02, 2016, respectively.

## 7. Worker's Compensation

Goodwill maintains a high-deductible worker's compensation insurance policy, under which Goodwill pays the first $100,000 of each claim. Goodwill's insurer pays the remainder of each claim that exceeds $100,000. Goodwill maintains an estimated liability for open claims based on the insurer's claims information. At December 31, 2016 and January 02, 2016, the liabilities for worker's compensation claims were $212,477 and $95,632, respectively, which are included in accrued liabilities on the statement of financial position.

Goodwill incurred $819,612 and $853,625 in 2016 and 2015, respectively, for worker's compensation insurance expense and administration fees.

Goodwill maintains a direct pay letter of credit with a commercial bank as credit security for the high deductible worker's compensation policy. The letter of credit amount was $500,000 in 2016 and 2015. Goodwill pays 1.55% annually for the letter of credit.

## 8. Environmental Liability

Goodwill is part of an Indiana Department of Environmental Management (IDEM) investigation related to certain environmental claims at and near Goodwill's Indianapolis headquarters building. Goodwill has accrued $126,056 and $133,839 at December 31, 2016 and January 02, 2016, respectively. The accrual is based on estimates, quotes and actual charges for mitigation efforts, ongoing monitoring and legal fees related to the IDEM investigation. Goodwill incurred $350,760 of expense in 2015 related to this matter, with no expense in 2016, which is reflected as part of occupancy expenses in the statement of functional expenses.

Goodwill's insurance carriers were notified of the IDEM investigation as of May 27, 2015. Goodwill believes its contracts with the insurance carriers are enforceable for claims related to the IDEM investigation. However, Goodwill would be responsible for any amounts that its insurance carriers do not cover. Goodwill is currently assessing any potential receivables to be recorded for recoveries from the insurance carriers. As of December 31, 2016 and January 02, 2016, no receivable has been recorded. Future revisions in Goodwill's estimates of these claims could materially impact its results of operations and financial position. Goodwill uses the best information available to determine the level of accrued liabilities and Goodwill believes their accruals are adequate.

## 9. Temporarily Restricted Net Assets

In December 2016, Goodwill received a restricted $10 million Grant from a third party funder to support employment opportunities, Nurse Family Partnership, philanthropy, and data capacity related to its merger with Goodwill of Southern Indiana, Inc. ("Merger" – see Subsequent Events Note 17). Through December 31, 2016, Goodwill incurred Merger-related expenses of approximately $1.3 million, including $1.1 million of Grant-eligible expenses. The Grant activity is reflected as other contributions in the Statement of Activities, and as a contribution receivable on the Statement of Financial Position.

## 9. Temporarily Restricted Net Assets, Continued

Temporarily restricted net assets are generated primarily through private grants and are available for the following purposes as of December 31, 2016 and January 02, 2016:

| | December 31, 2016 | January 02, 2016 |
|---|---|---|
| Youth and adult education | $ 316,610 | $ 256,436 |
| Employment opportunities | 4,375,772 | - |
| Nurse-Family partnership | 3,000,000 | - |
| Philanthropy | 700,000 | - |
| Data capacity | 800,000 | - |
| | $ 9,192,382 | $ 256,436 |

## 10. Lease Obligations

Goodwill leases 50 retail stores and 20 other buildings used in operations. The lease agreements have terms of up to 15 years and certain leases have one or more renewal options for up to an additional five years per option. Aggregate rental expense for 2016 and 2015, including common area maintenance charges, totaled $10,524,969 and $9,219,449, respectively. Four of Goodwill's retail store leases contain a right of first refusal. This right provides Goodwill an option to purchase the store at fair market value if the landlord has a bona fide offer from a third party. Fair market value is the price offered by a third party in an arms-length transaction. Goodwill's management cannot determine if it would elect to purchase any of the stores for which it has a right of first refusal.

Goodwill leases office equipment. Rent expense under these leases was $538,438 and $486,390 for 2016 and 2015, respectively.

Goodwill leases vehicles, equipment and drivers used in operations. The leases expire in March 2021. Fixed lease costs are $9,222 weekly and variable costs are $0.1625 per mile driven. Labor rates for drivers vary from $19.90 to $21.61 per straight-time hour. Goodwill entered into a lease for vehicles for their Commercial Services division. The lease expires in April 2022. Fixed costs are $2,716 monthly and variable costs are $0.09 per mile driven. Goodwill's expense under these leases was $1,583,385 and $1,466,325 for 2016 and 2015, respectively.

GEI leases one of its locations from GICI and the rest from third parties. The effects of the lease between GEI and GICI have been eliminated in consolidation. Aggregate rental expense for 2016 and 2015 was $1,462,430 and $1,223,157, respectively. The lease agreements have terms of up to 10 years from the lease commencement date and certain leases have one or more renewal options for up to an additional five years per option.

## 10. Lease Obligations, Continued

Future minimum rental payments required under operating leases that have initial or remaining lease terms as of December 31, 2016 are as follows for the fiscal years ending:

| | | |
|---|---|---|
| 2017 | $ | 11,472,016 |
| 2018 | | 10,287,901 |
| 2019 | | 9,503,086 |
| 2020 | | 8,532,105 |
| 2021 | | 6,327,716 |
| Thereafter | | 24,033,044 |
| | $ | 70,155,868 |

## 11. Retirement Plan

Goodwill maintains a discretionary thrift plan which allows eligible employees to contribute pre-tax gross income subject to certain IRS limitations. Goodwill matches 100% of eligible employees' pre-tax contributions up to 6% of gross income. Goodwill may also make additional discretionary contributions to the plan. Employer matching contributions vest after three years or in the event of death or disability. Employer discretionary contributions vest after five years or in the event of death or disability. Goodwill's expense relating to contributions to the thrift plan for 2016 and 2015 was $1,108,974 and $1,314,318, respectively.

## 12. Related Party Transactions

Goodwill Industries Foundation of Central Indiana, Inc. (the "Foundation") has common management with Goodwill and provides grant support for Goodwill and GEI. The accompanying financial statements of Goodwill have not been consolidated with those of the Foundation due to less than a majority voting interest and lack of controlling financial interest between the two organizations.

At December 31, 2016 and January 02, 2016, the Foundation had net assets of $33.3 million and $31.3 million, respectively, comprised primarily of equity mutual fund investments, equity hedge funds and alternative investments consisting of private equity and natural resource funds. For 2016 and 2015, the Foundation paid grants to Goodwill of $1,133,824 and $1,126,926, respectively, which is included in "support" on the Statement of Activities. The Foundation also reimburses Goodwill for certain fundraising expenses and pays Goodwill a management fee. This reimbursement and management fee totaled $811,808 and $773,321 for 2016 and 2015, respectively. Included in other receivables at December 31, 2016 and January 02, 2016 is $136,583 and $85,181, respectively, due from the Foundation for grants receivable from the Foundation, reimbursement of fundraising expenses incurred by Goodwill and expenses of the Foundation paid by Goodwill.

## 12. Related Party Transactions, Continued

GEI leases an Excel Center facility owned by an entity controlled by a GICI board member. The lease for the facility has a 10-year term with a provision that allows early termination if the Excel Center's charter is not renewed when it expires in 2017 and has a rent rate comparable to similar facilities in the same geographic area. The lease became effective January 01, 2012. The board member recused himself from all board of directors' discussion and voting related to the lease transaction.

In February 2014, Goodwill issued tax-exempt bonds through the Indiana Finance Authority (IFA). A Goodwill board member also serves on the board of the IFA. The board member recused himself from all Goodwill and IFA board of directors' discussion and voting related to the bond transaction.

## 13. Future Grant Audits

Under the terms of federal grants awarded to Goodwill, periodic audits are required and certain costs may be challenged as to allowability under the terms of the grants. Such audits could lead to reimbursement to the grantor. Management believes the likelihood that material costs incurred by Goodwill will be disallowed is remote.

## 14. Self Insurance

Goodwill self insures for employee and dependent medical benefits up to a per-individual annual maximum of $150,000 and an aggregate maximum of approximately $7.8 million. Goodwill purchases reinsurance which pays individual claims that exceed $150,000 per year, in accordance with the provisions of the Affordable Care Act. The reinsurer reviews claims annually and upon renewal of the reinsurance policy each year may establish higher specific maximums on selected individuals with high claims risks. Goodwill purchases claims administration services from a third party administrator. Self insured medical expenses and related administrative costs were $5,772,745 and $4,884,810 for 2016 and 2015, respectively.

Goodwill maintains an estimated liability for incurred but not reported medical claims based on average claim costs and claims processing lag times. At December 31, 2016 and January 02, 2016, the estimated liability was $840,119 and $792,968, respectively, and is included in accrued liabilities in the statement of financial position.

## 15. Fair Value Measurements

Accounting Standards for Fair Value Measurement define fair value as the price that would be received for an asset or paid to transfer a liability (exit price) in an orderly transaction between market participants at the measurement date. Those standards also establish a three-level fair value hierarchy for disclosure that prioritizes valuations based on whether the significant inputs used to estimate fair value are observable, giving highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and lowest priority to valuations primarily based on unobservable inputs (level 3 measurements). Level 1 inputs are quoted prices (unadjusted) in active markets for identical assets or liabilities that the reporting entity has the ability to access at the measurement date. Level 2 inputs are inputs other than quoted prices included within Level 1 that are observable for the asset or liability, either directly or indirectly. Level 3 inputs are unobservable inputs for the asset or liability.

## 15. FAIR VALUE MEASUREMENTS, CONTINUED

Fair values measured on a recurring basis at December 31, 2016 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 3,092,756 | $ 3,092,756 | $ - | $ - |
| Interest rate swap | $ (57,111) | $ - | $ (57,111) | $ - |

Fair values measured on a recurring basis at January 02, 2016 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 3,446,329 | $ 3,446,329 | $ - | $ - |
| Interest rate swap | $ (167,591) | $ - | $ (167,591) | $ - |

Fair values for investments are determined by reference to readily available quoted market prices and other relevant information generated by market transactions. Fair value for the interest rate swap is determined by the prevailing one-month LIBOR rate at the valuation date. These methodologies have not changed since the prior year.

## 16. Federal, State and Local Grant Awards

In accordance with guidelines established by the Indiana State Board of accounts, this federal, state, and local grant information was included to aid in the verification of Indiana financial assistance on the Entity Annual Report (E-1).

| Program Name | Grantor Name | CFDA | Revenue | Expense | Funding Type |
|---|---|---|---|---|---|
| Jobs for America's Graduates | Indiana Private Industry Council d/b/a EmployIndy | N/A | $304,930 | $304,930 | State and local |
| New Beginnings | Indiana Department of Correction | N/A | $57,750 | $57,750 | State and local |
| Skill Up | Indiana Department of Workforce Development | N/A | $88,233 | $88,233 | State and local |
| Workforce Investment Act/Workforce Innovation and Opportunity Act Youth Activities | Indianapolis Private Industry council d/b/a EmployIndy | 17.259 | $180,080 | $180,080 | Federal grant passed through state or local government |
| Temporary Assistance for Needy Families | Indianapolis Private Industry council d/b/a EmployIndy | 93.558 | $118,776 | $118,776 | Federal grant passed through state or local government |
| Affordable Care Act – Maternal, Infant and Early Childhood Home Visiting Program - Nurse Family Partnership | Indiana State Department of Health | 93.505 | $3,585,329 | $3,585,329 | Federal grant passed through state or local government |
| Title V Maternal and Child Health Services Block Grant | Indiana State Department of Health | 93.994 | $1,183,315 | $1,183,315 | Federal grant passed through state or local government |
| Total funding | | | $5,518,413 | $5,518,413 | |

## 17. Subsequent Events

### Merger

In August 2016, GICI and Goodwill of Southern Indiana, Inc. agreed to merge, effective January 01, 2017. GICI is the surviving entity of the merger. Effective January 01, 2017, GICI changed its name to Goodwill of Central and Southern Indiana, Inc. ("GCSI").

## 17. Subsequent Events, Continued

The merger expands GCSI's operating territory to 39 counties in Indiana. It will allow continuity and expansion of mission and education services into 10 counties in Southern Indiana where the need for such services is acute. The merger will also create operation efficiencies in the GCSI retail system and enhance customer and used-goods donor experiences.

The merger had the following impact on GICI on January 01, 2017:

| | |
|---|---|
| Increase in assets: | |
| Cash and investments | $ 4,788,999 |
| Property and equipment | 6,587,769 |
| Other assets | 261,024 |
| Increase in liabilities: | |
| Debt | 3,474,851 |
| Accrued expenses and other liabilities | 612,264 |
| Net contribution of net assets | 7,550,677 |
| Total increases | $ 11,637,792 |

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

FOR THE YEAR ENDED DECEMBER 31, 2016

| FEDERAL GRANTOR/PASS-THROUGH GRANTOR/PROGRAM TITLE | Federal CFDA Number | Agency or Pass-Through Number | Federal Expenditures |
|---|---|---|---|
| U.S. DEPARTMENT OF LABOR | | | |
| Indianapolis Private Industry Council d/b/a EmployIndy | | | |
| *Workforce Investment Act/Workforce Innovation and Opportunity Act Youth Activities* | 17.259 | S0704-WI-15-Y | $ 180,080 |
| Goodwill Industries International | | | |
| *Senior Community Service Employment Program* | 17.235 | SCSEP-PY 15/16 Subgrant | 2,256,023 |
| *Total U.S. Department of Labor* | | | 2,436,103 |
| U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES | | | |
| Indianapolis Private Industry Council d/b/a EmployIndy | | | |
| *Temporary Assistance for Needy Families* | 93.558 | S0704-WI-15-Y | 118,776 |
| Indiana State Department of Health | | | |
| *Affordable Care Act - Maternal, Infant and Early Childhood Home Visiting Program - Nurse Family Partnership* | 93.505 | 13475 | 3,585,329 |
| *Title V Maternal and Child Health Services Block Grant* | 93.994 | 13475 | 1,183,315 |
| *Total Indiana State Department of Health* | | | 4,768,644 |
| *Total U.S. Department of Health and Human Services* | | | 4,887,420 |
| *Total expenditures of federal awards* | | | $ 7,323,523 |

## NOTE TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

### 1. BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of Goodwill Industries of Central Indiana, Inc. and subsidiaries (Goodwill) under programs of the federal government for the year ended December 31, 2016. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of Goodwill, it is not intended to and does not present the financial position, changes in net assets, or cash flows of Goodwill.

### 2 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Goodwill has elected to use the 10 percent de minimis indirect cost rate as allowed under the Uniform Guidance.

## Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*

### Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States of America, the consolidated financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries (Goodwill), which comprise the consolidated statement of financial position as of December 31, 2016, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to consolidated financial statements, which collectively comprise Goodwill's basic consolidated financial statements, and have issued our report thereon dated March 02, 2017.

### Internal Control Over Financial Reporting

In planning and performing our audit of the consolidated financial statements, we considered Goodwill's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of Goodwill's internal control. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's consolidated financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## Compliance and Other Matters

As part of obtaining reasonable assurance about whether Goodwill's consolidated financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of consolidated financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

## Purpose of this Report

This purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Goodwill's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

March 02, 2017

## Report on Compliance For Each Major Federal Program
## And Report on Internal Control Over Compliance

## Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

### Report on Compliance for Each Major Federal Program

We have audited Goodwill Industries of Central Indiana, Inc. and subsidiaries' (Goodwill) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Goodwill's major federal programs for the year ended December 31, 2016. Goodwill's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Goodwill's basic financial statements include the operations of Goodwill Education Initiatives, Inc. (GEI) which received $1,059,815 in federal awards which is not included in the schedule of expenditures of federal awards during the year ended December 31, 2016. Our audit, described below, did not include the operations of GEI because the entity's June 30 financial statements are audited at the Charter School Organizer level in accordance with *Government Auditing Standards* and Uniform Guidance.

### Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

### Auditors' Responsibility

Our responsibility is to express an opinion on compliance for each of Goodwill's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Goodwill's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Goodwill's compliance.

## Opinion on Each Major Federal Program

In our opinion, Goodwill complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended December 31, 2016.

## Report on Internal Control Over Compliance

Management of Goodwill is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Goodwill's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

March 02, 2017

## A. SUMMARY OF AUDITORS' RESULTS

### FINANCIAL STATEMENTS

1. Type of auditors' report issued on whether the financial statements audited were prepared in accordance with Generally Accepted Accounting Principles (GAAP): Unmodified

2. Internal control over financial reporting:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

3. Noncompliance material to financial statements noted? _____yes ___x___no

### FEDERAL AWARDS

4. Internal control over major programs:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

5. Type of auditors' report issued on compliance for major programs: Unmodified

6. Any audit findings disclosed that are required to be reported in accordance with 2 CFR section 200.516(a)? _____yes ___x___no

7. Identification of major federal programs:

| CFDA Number | Name of Federal Program or Cluster |
|---|---|
| 17.235 | Senior Community Service Employment Program |
| 93.994 | Title V Maternal and Child Health Services Block Grant |

8. Dollar threshold used to distinguish between type A and type B programs: $ 750,000

9. Auditee qualified as low-risk auditee? _____yes ___x____no

## B. FINDINGS - FINANCIAL STATEMENT AUDIT

None

## C. FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAMS AUDIT

None

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To the Boards of Directors and Management of
Goodwill Industries of Central Indiana, Inc. and subsidiaries and
Goodwill Industries Foundation of Central Indiana, Inc.:

In planning and performing our audit of the combining financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries and Goodwill Industries Foundation of Central Indiana, Inc. (collectively referred to as the Organizations) as of and for the year ended January 02, 2016, in accordance with auditing standards generally accepted in the United States of America, we considered the Organizations' internal control over financial reporting (internal control) as a basis for designing our auditing procedures for the purpose of expressing our opinion on the combining financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organizations' internal control. Accordingly, we do not express an opinion on the effectiveness of the Organizations' internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be deficiencies, significant deficiencies, or material weaknesses. We did not identify any deficiencies in internal control that we consider to be material weaknesses, as defined above.

This communication is solely for the information and use of management, Finance and Audit Committee and Boards of Directors, others within the organization, and is not intended to be and should not be used by anyone other than these specified parties.

Greenwalt CPAs, Inc.

February 23, 2016

# GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED FINANCIAL STATEMENTS

Together with Independent Auditors' Report

JANUARY 02, 2016 AND JANUARY 03, 2015

GREENWALT CPAs

We Deliver Peace of Mind

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GREENWALT CPAs

# Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

## Report on the Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of Goodwill Industries of Central Indiana, Inc. (an Indiana not-for-profit organization) and subsidiaries (Goodwill), which comprise the consolidated statement of financial position as of January 02, 2016, and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and related notes to the consolidated financial statements.

## Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

## Auditors' Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the consolidated financial position of Goodwill as of January 02, 2016, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

## Report on Summarized Comparative Information

We have previously audited Goodwill's January 03, 2015 consolidated financial statements, and we expressed an unmodified audit opinion on those consolidated financial statements in our report dated March 5, 2015. In our opinion, the summarized comparative information presented herein as of and for the year ended January 03, 2015, is consistent, in all material respects, with the audited consolidated financial statements from which it has been derived.

## Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

## Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated February 23, 2016, on our consideration of Goodwill's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill's internal control over financial reporting and compliance.

Greenwalt CPAs, Inc.

February 23, 2016

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

JANUARY 02, 2016 WITH SUMMARIZED COMPARATIVE INFORMATION AS OF JANUARY 03, 2015

| ASSETS | Unrestricted | Temporarily Restricted | Eliminations | Totals January 02, 2016 | Totals January 03, 2015 |
|---|---|---|---|---|---|
| **CURRENT ASSETS** | | | | | |
| Cash and cash equivalents | $ 8,172,939 | $ 245,558 | $ - | $ 8,418,497 | $ 6,046,533 |
| Trade accounts receivable, net | 6,288,628 | - | - | 6,288,628 | 4,736,640 |
| Other receivables, net | 625,114 | - | - | 625,114 | 499,550 |
| Inventories | 4,449,594 | - | - | 4,449,594 | 4,437,252 |
| Prepayments | 1,705,455 | - | - | 1,705,455 | 1,613,537 |
| Due from other funds | - | 10,878 | (10,878) | - | - |
| *Total current assets* | 21,241,730 | 256,436 | (10,878) | 21,487,288 | 17,333,512 |
| **LONG-TERM ASSETS** | | | | | |
| Land and improvements | 13,580,545 | - | - | 13,580,545 | 12,494,728 |
| Buildings and improvements | 45,955,307 | - | - | 45,955,307 | 44,323,491 |
| Equipment | 36,388,164 | - | - | 36,388,164 | 33,563,547 |
| Projects in progress | 814,112 | - | - | 814,112 | 1,139,354 |
| | 96,738,128 | - | - | 96,738,128 | 91,521,120 |
| Accumulated depreciation | (41,843,850) | - | - | (41,843,850) | (36,260,753) |
| *Net property and equipment* | 54,894,278 | - | - | 54,894,278 | 55,260,367 |
| Investments | 3,446,329 | - | - | 3,446,329 | 4,406,561 |
| Deposits | 53,548 | - | - | 53,548 | 25,000 |
| Other assets | 129,157 | - | - | 129,157 | 139,020 |
| *Total long-term assets* | 58,523,312 | - | - | 58,523,312 | 59,830,948 |
| | $ 79,765,042 | $ 256,436 | $ (10,878) | $ 80,010,600 | $ 77,164,460 |
| **LIABILITIES AND NET ASSETS** | | | | | |
| **CURRENT LIABILITIES** | | | | | |
| Bank line of credit | $ 2,150,000 | $ - | $ - | $ 2,150,000 | $ 650,000 |
| Current portion of bonds and notes payable | 1,883,145 | - | - | 1,883,145 | 1,100,450 |
| Accounts payable | 6,030,599 | - | - | 6,030,599 | 6,332,554 |
| Accrued liabilities | 4,152,168 | - | - | 4,152,168 | 4,404,688 |
| Due to other funds | 10,878 | - | (10,878) | - | - |
| *Total current liabilities* | 14,226,790 | - | (10,878) | 14,215,912 | 12,487,692 |
| **LONG-TERM LIABILITIES** | | | | | |
| Bonds and notes payable | 15,810,709 | - | - | 15,810,709 | 17,137,518 |
| Other long-term liabilities | 288,125 | - | - | 288,125 | 453,356 |
| *Total long-term liabilities* | 16,098,834 | - | - | 16,098,834 | 17,590,874 |
| *Total liabilities* | 30,325,624 | - | (10,878) | 30,314,746 | 30,078,566 |
| **COMMITMENTS AND CONTINGENCIES (NOTES 7, 8, 10, 13 AND 14)** | | | | | |
| **NET ASSETS** | 49,439,418 | 256,436 | - | 49,695,854 | 47,085,894 |
| | $ 79,765,042 | $ 256,436 | $ (10,878) | $ 80,010,600 | $ 77,164,460 |

See accompanying notes to financial statements.

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED JANUARY 02, 2016

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED JANUARY 03, 2015

| | | | Totals | |
|---|---|---|---|---|
| | Unrestricted | Temporarily Restricted | January 02, 2016 | January 03, 2015 |
| **REVENUE** | | | | |
| Sales - donated goods | $ 78,712,597 | $ - | $ 78,712,597 | $ 77,015,877 |
| Sales - purchased goods | 133,718 | - | 133,718 | 3,071,472 |
| Commercial services | 17,449,840 | - | 17,449,840 | 14,964,845 |
| Mission advancement | 6,954,313 | - | 6,954,313 | 7,022,674 |
| Education services | 27,051,256 | 350,000 | 27,401,256 | 24,278,863 |
| Interest and dividend income | 48,822 | - | 48,822 | 65,569 |
| Realized loss on investments | (143) | - | (143) | (28,922) |
| Unrealized gain (loss) on investments | (8,645) | - | (8,645) | 13,978 |
| Net loss on disposition of property | (33,905) | - | (33,905) | (112,558) |
| Gain on interest rate swap hedge | 122,123 | - | 122,123 | 141,107 |
| Other, net | 1,088,071 | - | 1,088,071 | 1,439,919 |
| *Total revenue* | 131,518,047 | 350,000 | 131,868,047 | 127,872,824 |
| **SUPPORT** | | | | |
| United Way of Central Indiana, Inc. | | | | |
| Allocation | 377,723 | - | 377,723 | 400,573 |
| Annual and capital campaign contributions | 11,226 | - | 11,226 | 10,170 |
| Other contributions | 1,744,591 | - | 1,744,591 | 703,888 |
| *Total support* | 2,133,540 | - | 2,133,540 | 1,114,631 |
| **NET ASSETS RELEASED FROM RESTRICTIONS** | 170,671 | (170,671) | - | - |
| *Total revenue and support* | 133,822,258 | 179,329 | 134,001,587 | 128,987,455 |
| **EXPENSES** | | | | |
| Retail and commercial services | 81,749,906 | - | 81,749,906 | 80,532,867 |
| Mission advancement | 8,576,964 | - | 8,576,964 | 7,563,695 |
| Education services | 25,657,380 | - | 25,657,380 | 24,475,694 |
| General and administrative | 14,673,354 | - | 14,673,354 | 14,537,771 |
| Fundraising | 734,023 | - | 734,023 | 492,667 |
| *Total expenses* | 131,391,627 | - | 131,391,627 | 127,602,694 |
| **CHANGE IN NET ASSETS** | 2,430,631 | 179,329 | 2,609,960 | 1,384,761 |
| **NET ASSETS, BEGINNING OF YEAR** | 47,008,787 | 77,107 | 47,085,894 | 45,701,133 |
| **NET ASSETS, END OF YEAR** | $ 49,439,418 | $ 256,436 | $ 49,695,854 | $ 47,085,894 |

See accompanying notes to financial statements.

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

FOR THE YEAR ENDED JANUARY 02, 2016

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED JANUARY 03, 2015

| | Retail and Commercial Services | Mission Advancement | Education Services | General and Administrative | Fundraising | Totals | |
|---|---|---|---|---|---|---|---|
| | | | | | | January 02, 2016 | January 03, 2015 |
| Salaries and wages | $ 34,160,836 | $ 5,844,225 | $ 12,679,798 | $ 7,414,747 | $ 491,091 | $ 60,590,697 | $ 58,492,562 |
| Employee benefits | 8,042,864 | 1,211,954 | 4,408,387 | 1,618,319 | 103,492 | 15,385,016 | 16,497,949 |
| Professional services | 3,941,008 | 446,940 | 929,505 | 1,675,718 | 10,284 | 7,003,455 | 5,156,312 |
| Supplies | 4,867,408 | 168,916 | 298,596 | 198,979 | 6,947 | 5,540,846 | 5,582,890 |
| Cost of sales | 7,292,609 | - | - | - | - | 7,292,609 | 7,433,150 |
| Occupancy | 16,547,169 | 418,440 | 2,505,098 | 1,889,431 | 28,966 | 21,389,104 | 21,192,294 |
| Advertising and printing | 1,241,101 | 8,666 | 133,386 | 418,828 | 49,687 | 1,851,668 | 1,407,171 |
| Travel and transportation | 1,456,301 | 237,297 | 414,559 | 297,960 | 18,004 | 2,424,121 | 2,433,757 |
| Staff development | 8,312 | 56,414 | 77,754 | 132,162 | 1,500 | 276,142 | 174,851 |
| Memberships and dues | 7,253 | 4,551 | 13,080 | 208,096 | 3,147 | 236,127 | 232,507 |
| Client tuition, training and assistance | 134 | 79,510 | - | - | - | 79,644 | 52,546 |
| Student services | - | - | 1,724,622 | - | - | 1,724,622 | 1,688,377 |
| Depreciation and amortization | 3,360,862 | 66,101 | 2,262,969 | 630,005 | 4,341 | 6,324,278 | 6,087,748 |
| Bad debt expense | 100,563 | - | 45,000 | - | - | 145,563 | 97,804 |
| Interest expense | 341,843 | - | 137,504 | 72,490 | - | 551,837 | 444,918 |
| Other | 381,643 | 33,950 | 27,122 | 116,619 | 16,564 | 575,898 | 627,858 |
| | $ 81,749,906 | $ 8,576,964 | $ 25,657,380 | $ 14,673,354 | $ 734,023 | $ 131,391,627 | $ 127,602,694 |

See accompanying notes to financial statements.

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES
CONSOLIDATED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JANUARY 02, 2016 AND JANUARY 03, 2015

## INCREASE IN CASH AND CASH EQUIVALENTS

| | January 02, 2016 | January 03, 2015 |
|---|---|---|
| **CASH FLOWS FROM OPERATING ACTIVITIES** | | |
| Change in net assets | $ 2,609,960 | $ 1,384,761 |
| Depreciation and amortization | 6,324,279 | 6,087,748 |
| Gain on interest rate swap hedge | (122,123) | (141,107) |
| Realized loss on investments | 143 | 28,922 |
| Unrealized (gain) loss on investments | 8,645 | (13,978) |
| Net loss on disposition of property | 33,905 | 112,558 |
| *(Increase) decrease in operating assets:* | | |
| Trade accounts receivable | (1,551,988) | (2,484,640) |
| Charter school accounts receivable | - | 874,417 |
| Other receivables | (125,564) | 1,364,127 |
| Inventories | (12,342) | (158,539) |
| Prepayments | (91,918) | (851,958) |
| Deposits | (28,548) | (25,000) |
| Other assets | 9,863 | (48,356) |
| *Increase (decrease) in operating liabilities:* | | |
| Accounts payable and accrued liabilities | (554,475) | (83,079) |
| Other long-term liabilities | (43,108) | (43,108) |
| *Net cash provided by operating activities* | 6,456,729 | 6,002,768 |
| **CASH FLOWS FROM INVESTING ACTIVITIES** | | |
| Purchases of investments | (1,039,930) | (4,453,767) |
| Proceeds from sales of investments | 1,991,374 | 5,087,286 |
| Proceeds from sales of fixed assets | 52,274 | 2,158,187 |
| Capital expenditures | (6,044,368) | (15,820,495) |
| *Net cash used in investing activities* | (5,040,650) | (13,028,789) |
| **CASH FLOWS FROM FINANCING ACTIVITIES** | | |
| Borrowing (repayments) on line of credit, net | 1,500,000 | (1,356,500) |
| Proceeds from bonds and notes payable | - | 10,500,000 |
| Principal payments on bonds and notes payable | (544,114) | (1,772,623) |
| *Net cash provided by financing activities* | 955,886 | 7,370,877 |
| **INCREASE IN CASH AND CASH EQUIVALENTS** | 2,371,965 | 344,856 |
| **CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR** | 6,046,533 | 5,701,677 |
| **CASH AND CASH EQUIVALENTS, END OF YEAR** | $ 8,418,498 | $ 6,046,533 |
| **SUPPLEMENTAL CASH FLOWS INFORMATION** | | |
| Cash paid for interest | $ 455,790 | $ 370,112 |

See accompanying notes to financial statements.

## 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

### PRINCIPLES OF CONSOLIDATION

These consolidated financial statements include the accounts of Goodwill Industries of Central Indiana, Inc. and its subsidiary companies. The term "Goodwill" used herein means Goodwill Industries of Central Indiana, Inc. and its subsidiaries, unless otherwise indicated by the context. All material inter-company accounts and transactions have been eliminated.

### DESCRIPTION OF ORGANIZATION

Goodwill Industries of Central Indiana, Inc. ("GICI") and its subsidiaries, GW Commercial Services, Inc. ("GWCS") and Goodwill Education Initiatives, Inc. ("GEI") (collectively referred to as "Goodwill") are Indiana non-profit organizations that offer employment, education and related services to disadvantaged adults and young people throughout central Indiana. Goodwill defines disadvantaged individuals as those with a barrier to employment such as a disability, a criminal history and/or a low education level (less than a high school diploma).

GICI's Retail operation collects donations of used clothing and household items and sells them through a network of 54 thrift stores, three warehouse outlet centers and two vintage stores. Excess and unsalable donated items are sold through salvage and recycling channels. Unique items, jewelry and books are often sold through e-commerce channels. The Retail operation also accepts and sells donated automobiles, using a third party only for vehicle towing and auction services. The Retail operation employs nearly 2,300 individuals, more than 65% of whom are disabled or disadvantaged. These operations generate revenue and cash flow that fund a large portion of GICI's other mission-related operations and general and administrative expenses.

GICI's Commercial Services ("CS") operation provides a variety of outsource packaging, assembly and fulfillment services to external customers, employing over 200 disabled and disadvantaged individuals.

GWCS is operated under common management with GICI's Commercial Services operations and provides rehabilitative training and jobs for people who have significant disabilities, primarily through service contracts with various federal governmental entities pursuant to AbilityOne (formerly known as the Javits-Wagner-O'Day Act of 1971). AbilityOne requires certain federal governmental entities to purchase selected products and services, via such contracts, from non-profit agencies employing blind or significantly disabled individuals. GWCS operates 11 AbilityOne contracts at government sites in Indianapolis, Indiana and employs approximately 120 significantly disabled individuals.

GICI's Mission Advancement ("MA") operation provides case management, counseling, training, education, job coaching, job placement and related supportive services, for disabled, disadvantaged, unemployed and under-employed individuals who wish to find and retain employment and increase their economic self-sufficiency. MA also manages programs designed to provide holistic whole-family services to Goodwill's low-wage workers and students, as well as to first-time expectant mothers and their families. The CS and MA segments of GICI are funded by a combination of contracts with external customers, service contracts with federal and state governmental entities, United Way grants, private grants and gifts from individuals and foundations, and subsidies from GICI's Retail operation.

## 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, CONTINUED

### DESCRIPTION OF ORGANIZATION, CONTINUED

GEI provides educational opportunities designed to enable young people and adults to prepare for more productive lives. GEI operates public charter high schools in central Indiana under the provisions of the Indiana Charter School laws and the chartering authorities of the Mayor of Indianapolis and the Indiana Charter School Board. The following table provides more information regarding GEI's charter schools.

| School Name | School Location | Chartering Authority | Number of Years in Operation | Student Enrollment at January 02, 2016 |
|---|---|---|---|---|
| Indianapolis Metropolitan High School | Indianapolis, IN (at GICI headquarters facility) | Mayor of Indianapolis | 12 | 260 |
| The Excel Center for Adult Learners | Four locations in Indianapolis, IN, including one at GICI headquarters facility | Mayor of Indianapolis | 5 | 1,234 |
| The Excel Center-Anderson | Anderson, IN | Indiana Charter School Board | 4 | 342 |
| The Excel Center – Kokomo | Kokomo, IN | Indiana Charter School Board | 3 | 345 |
| The Excel Center – Lafayette | Lafayette, IN | Indiana Charter School Board | 3 | 284 |
| The Excel Center – Richmond | Richmond, IN | Indiana Charter School Board | 3 | 282 |
| The Excel Center – West | Indianapolis, IN | Mayor of Indianapolis | 3 | 337 |
| The Excel Center - University Heights | Indianapolis, IN | Mayor of Indianapolis | 1 | 306 |
| The Excel Center - Noblesville | Noblesville, IN | Indiana Charter School Board | 1 | 137 |

The schools contract with GICI for certain business support services, including marketing, human resources, finance, technology and facilities management. The schools receive the majority of their funding from the Indiana Department of Education. Their revenues are supplemented with funds from the United States Department of Education, private grants, gifts and support from GICI. Indianapolis Metropolitan High School (the Met) primarily serves at-risk students in grades 9-12.

## 1. Summary of Significant Accounting Policies, Continued

### Description of Organization, Continued

The Excel Centers primarily serve adults who previously dropped out of high school and are seeking their high school diplomas rather than a GED.

Goodwill is a member of Goodwill Industries International, Inc. (GII). Goodwill operates autonomously and reports its financial results independent of GII or any other affiliated entity. Goodwill operates in a geographic territory assigned to it by GII encompassing 28 counties in central Indiana.

Goodwill is a member agency of United Way of Central Indiana, Inc. In 2015 and 2014, Goodwill received United Way grants of $377,723 and $400,573, respectively.

### Basis of Accounting And Use of Estimates

The accompanying financial statements were prepared on the accrual basis of accounting. The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America (GAAP) requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of support, revenues and expenses during the reporting period. For annual financial reporting purposes, Goodwill utilizes a 52-week period ending on the Saturday closest to December 31.

### Summarized Comparative Information

The financial statements include certain prior year summarized comparative information in total, but not by net asset class and functional expense class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP. Accordingly, such information should be read in conjunction with Goodwill's financial statements for the year ended January 03, 2015, from which the summarized information was derived.

### Cash and Cash Equivalents

Goodwill considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents. Goodwill maintains cash balances at commercial banks. Accounts at the banks are guaranteed by the Federal Deposit Insurance Corporation (FDIC) up to $250,000. At January 02, 2016, Goodwill maintained cash and cash equivalents in excess of the FDIC coverage limits.

### Trade Accounts Receivable

Trade accounts receivable are unsecured customer obligations generally requiring payment within 30 days of the invoice date.

Accounts receivable are stated at the amount billed to the customer or at amounts determined by public statute. Generally, customer account balances with invoices dated over 30 days are considered delinquent.

## 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES, CONTINUED

Management individually reviews all accounts receivable balances that are past due, and based on an assessment of current creditworthiness and other factors, estimates the portion, if any, of the balance that will not be collected.

### INVENTORIES

The retail store and e-commerce operations of Goodwill contain donated inventories. These items have little or no economic value to Goodwill when first received and therefore are not recorded at the time of donation. Donated goods are sold through retail store, e-commerce, salvage and recycling sales channels. Costs included in donated goods inventory include those incurred to collect, transport and process donated items to place them for sale in Goodwill's retail stores, e-commerce operations, or to salvage and recycling dealers. Retail store, e-commerce, recycling and salvage sales are reflected in the Statement of Activities as sales - donated goods.

Goodwill's commercial services operation has purchased inventories generally classified as raw material, work in process and finished goods. These inventories are valued in the financial statements at standard cost. Cost of sales is included in retail and commercial services expenses in the statement of functional expenses.

### PROPERTY AND EQUIPMENT

Property and equipment are recorded at historical cost. Donated property is recorded at the estimated fair market value at the date of donation. Depreciation is computed on the straight-line method over estimated useful lives ranging from 10 to 40 years for buildings and building improvements, and from 3 to 10 years for equipment and other capital assets. Leasehold improvements are depreciated over a period of time not exceeding the life of the corresponding property lease. Material property additions and improvements are capitalized and expenditures for normal maintenance and repairs are expensed as incurred.

Goodwill accumulates certain costs for capital projects until the projects are placed in service, at which time they become depreciable fixed assets. Goodwill's statement of financial position reflected projects in progress totaling $814,112 and $1,139,354 at January 02, 2016 and January 03, 2015, respectively.

### OTHER ASSETS

In December 2006, Goodwill issued $12 million of tax-exempt bonds to finance several capital projects and to refinance prior bond debt at a lower interest rate. Transaction costs for the bond issuance totaled $139,483 and are being amortized over the life of the bonds and the supporting letter of credit. In February 2014, Goodwill issued $10.5 million of tax-exempt bonds to finance several capital projects. Transaction costs for the bond issuance totaled $58,000 and are being amortized over the life of the bonds. The amortization costs are included in interest expense on the statement of functional expenses.

## 1. Summary of Significant Accounting Policies, Continued

### Net Assets

Goodwill maintains the following classifications of net assets:

#### Unrestricted

These include revenue and expenses from the regular operations of Goodwill, which are at the discretion of management and the Board of Directors.

#### Temporarily Restricted

These include donations and grant revenues used to meet expenses of current operations in accordance with restrictions specified by the donors or grantors.

### Contributions

Contributions are recognized when the donor makes an unconditional promise to give to Goodwill and are recorded at their fair values as revenues and assets in the period received. Contributions that are restricted by the donor are reported as increases in unrestricted net assets if the restrictions expire in the year in which the contributions are recognized. All other donor-restricted contributions are reported as increases in temporarily restricted net assets. When a restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets.

### Expense Allocation

Expenses have been classified as retail and commercial services, mission advancement, education services, general and administrative, and fundraising. Goodwill uses actual direct expenditures and cost allocations, based on estimates of time and usage by Goodwill personnel and programs, to classify its expenses.

### Advertising

Advertising and printing expenses totaled $1,851,668 in 2015 and $1,407,171 in 2014, respectively. Goodwill's policy is to record advertising expenditures in the period in which they are incurred.

### Subsequent Events

Subsequent events have been considered through February 23, 2016, which was the date the financial statements were available to be issued.

## 2. TAX STATUS

Goodwill and its subsidiaries are Indiana not-for-profit corporations, exempt from income tax under Section 501(c)(3) of the U.S. Internal Revenue Code. However, if income was generated from certain activities not directly related to Goodwill's tax-exempt purposes, such income would be subject to taxation as unrelated business income. Goodwill and its subsidiaries are not considered private foundations as defined in Section 509(a) of the Internal Revenue Code.

Goodwill is no longer subject to examination by taxing authorities for tax years before 2012.

## 3. TRADE ACCOUNTS RECEIVABLE

Trade accounts receivable are summarized as follows:

| | January 02, 2016 | January 03, 2015 |
|---|---|---|
| Trade accounts receivable | $ 6,470,949 | $ 4,903,794 |
| Less – allowance for uncollectible accounts | (182,321) | (167,154) |
| Trade accounts receivable, net | $ 6,288,628 | $ 4,736,640 |

## 4. INVENTORIES

Inventories are summarized as follows:

| | January 02, 2016 | January 03, 2015 |
|---|---|---|
| Donated goods | $ 3,700,418 | $ 3,788,730 |
| Purchased goods | 749,176 | 648,522 |
| | $ 4,449,594 | $ 4,437,252 |

## 5. INVESTMENTS

Goodwill's investments in equity securities with readily determinable fair values and all investments in debt securities are stated at fair value in the Statements of Financial Position (see Note 15). Realized and unrealized gains and losses are reported in the Statement of Activities.

Goodwill held the following investment securities at:

| | January 02, 2016 | January 03, 2015 |
|---|---|---|
| Mutual funds – market value | $ 3,446,329 | $ 4,406,561 |
| Mutual funds – cost basis | $ 3,466,396 | $ 4,401,734 |

## 6. BONDS AND NOTES PAYABLE

a. Goodwill has a committed line of credit with a commercial bank, expiring December 2017. This line of credit provides for maximum borrowings of $5,000,000 and bears interest at one-month LIBOR plus 1.75% (a total of 2.18% at January 02, 2016). As of January 02, 2016 and January 03, 2015, Goodwill had $2,150,000 and $650,000, respectively, outstanding on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2015 and 2014, Goodwill paid $5,141 and $6,806, respectively, in non-use fees.

   GEI has a line of credit with a commercial bank, which expires September 2016. This line of credit provides for maximum borrowings of $1,500,000 and bears interest at one-month LIBOR plus 1.75% (a total of 2.18% at January 02, 2016). As of January 02, 2016 and January 03, 2015, GEI had no outstanding balance on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2015 and 2014, GEI paid $4,192 and $2,888 in non-use fees. The GEI line of credit is guaranteed by Goodwill.

b. In December 2006, Goodwill issued $12 million of tax-exempt long-term bonds, the proceeds of which were used to build 2 new retail stores, refinance then-existing debt and remodel Goodwill's Indianapolis headquarters campus to accommodate new charter high school space and related ancillary facilities. The bonds bear interest at an adjustable interest rate and currently re-price every seven days based on market conditions. The interest rate approximates the quoted weekly Securities Industry and Financial Markets Association (SIFMA) Index rate. In 2015, the interest rate on the bonds ranged from 0.06% to 0.08%. Goodwill is required to make annual principal payments of $600,000, through 2027. The outstanding balance of the bonds payable at both January 02, 2016 and January 03, 2015 was $7,200,000.

   Goodwill maintains a direct-pay letter of credit facility with a commercial bank that secures Goodwill's 2006 tax exempt bonds. Goodwill paid fees equal to 55 basis points in 2015 and 2014 to the bank to maintain the letter of credit. Goodwill paid letter of credit fees for the 2006 bonds of $43,624 and $44,172 in 2015 and 2014, respectively, which is included in interest expense on the statement of functional expenses.

## 6. BONDS AND NOTES PAYABLE, CONTINUED

Goodwill also pays remarketing fees to a remarketing agent for the 2006 bonds, equal to 0.10% of the amount of bonds outstanding. Goodwill paid $7,253 and $7,853 of remarketing fees in 2015 and 2014, respectively.

c. In February 2014, Goodwill issued $10.5 million of tax-exempt bonds through the Indiana Finance Authority. The bonds have a 20-year term and have a 2.57% fixed interest rate for the first seven (7) years, through March 2, 2021. Goodwill made monthly interest payments beginning August 1, 2014 and monthly principal and interest payments beginning May 1, 2015. The bonds are held by a commercial bank for the first seven years, after which Goodwill has the right to refinance the then-outstanding principal, renegotiate the interest rate and/or place the bonds in the open market via a remarketing agent and trustee. The bonds are unrated and are not specifically secured by any collateral or credit enhancement vehicles. Proceeds of the bonds were used to finance construction of four retail stores and significant remodeling at Goodwill's Indianapolis headquarters facility. The outstanding balance of bonds payable under the 2014 issuance at January 02, 2016 and January 3, 2015 was $10,106,250 and $10,500,000, respectively.

d. In 2013, GEI opened four new Excel Centers and entered into operating leases for the locations. In two of the locations, tenant improvements were financed through notes payable to commercial banks. The notes require monthly principal and interest payments for five years, through 2018. The duration of the notes matches the length of the respective Excel Center charters.

| Excel Center Location | Original Amount | Interest Rate | Expiration Date | Balance as of January 02, 2016 |
|---|---|---|---|---|
| Lafayette, IN | $274,554 | 5% | 4/1/2018 | $150,035 |
| Kokomo, IN | $450,000 | 5% | 7/1/2018 | $237,569 |

e. Total interest expense as shown on the statement of functional expenses consists of the following:

| | 2015 | 2014 |
|---|---|---|
| Bond, notes payable and line of credit interest | $ 475,155 | $ 370,112 |
| Letter of credit fees | 50,222 | 47,626 |
| Remarketing fees | 7,253 | 7,853 |
| Bond amortization expenses | 9,874 | 9,633 |
| Line of credit non-use fees | 9,333 | 9,694 |
| Total interest expense | $ 551,837 | $ 444,918 |

f. Goodwill is party to an interest rate swap in order to manage interest rate risk on a portion of its bond debt, the notional amount of which was $3,867,500 at January 02, 2016. The swap agreement provides for Goodwill to pay a fixed interest rate of 3.85% for ten years in exchange for the underlying floating interest rate. At January 02, 2016 and January 03, 2015, the swap had a negative fair value of $167,591 and $289,714, respectively. The fair value of the swap is included in other long-term liabilities on the Statement of Financial Position and the change in fair value from 2014 to 2015 is recorded as a gain on interest rate swap hedge on the statement of activities.

## 6. Bonds and Notes Payable, Continued

g. The aggregate maturities of long-term debt are as follows for the following fiscal years:

| | |
|---|---|
| 2016 | $ 1,883,145 |
| 2017 | 1,291,237 |
| 2018 | 1,188,253 |
| 2019 | 1,125,000 |
| 2020 | 1,125,000 |
| Thereafter | 11,081,219 |
| | $ 17,693,854 |

## 7. Worker's Compensation

Goodwill maintains a high-deductible workers compensation insurance policy, under which Goodwill pays the first $100,000 of each claim. Goodwill's insurer pays the remainder of each claim that exceeds $100,000. Goodwill maintains an estimated liability for open claims based on the insurer's claims information. At January 02, 2016 and January 03, 2015, the liability for workers compensation claims was $95,632 and $100,000, respectively, which is included in accrued liabilities on the statement of financial position.

Goodwill incurred $853,625 and $809,477 in 2015 and 2014, respectively, for workers compensation insurance expense and administration fees.

Goodwill maintains a direct pay letter of credit with a commercial bank as credit security for the high deductible workers compensation policy. The letter of credit amount was $500,000 in 2015 and 2014. Goodwill pays 1.55% annually for the letter of credit.

## 8. Environmental Liability

Goodwill is part of an Indiana Department of Environmental Management (IDEM) investigation related to certain environmental claims at and near Goodwill's Indianapolis headquarters building. Goodwill has accrued $133,839 at January 2, 2016, with no accrual at January 3, 2015. The accrual is based on estimates, quotes and actual charges for mitigation efforts, ongoing monitoring and legal fees related to the IDEM investigation. In 2015, Goodwill incurred $350,760 of expense related to this matter, which is reflected as part of occupancy expenses in the statement of functional expenses.

Goodwill's insurance carriers were notified of the IDEM investigation as of May 27, 2015. Goodwill believes its contracts with the insurance carriers are enforceable for claims related to the IDEM investigation. However, Goodwill would be responsible for any amounts that its insurance carriers do not cover. Goodwill is currently assessing any potential receivables to be recorded for recoveries from the insurance carriers. As of January 2, 2016 no receivable has been recorded. Future revisions in Goodwill's estimates of these claims could materially impact its results of operations and financial position. Goodwill uses the best information available to determine the level of accrued liabilities and Goodwill believes their accruals are adequate.

## 9. Temporarily Restricted Net Assets

Temporarily restricted net assets are generated primarily through private grants and are available for youth and adult education.

## 10. Lease Obligations

Goodwill leases 45 retail stores and 18 other buildings used in operations. The lease agreements have terms of up to 15 years and certain leases have one or more renewal options for up to an additional five years per option. Aggregate rental expense for 2015 and 2014, including common area maintenance charges, totaled $9,219,449 and $8,829,826, respectively. Four of Goodwill's retail store leases contain a right of first refusal. This right provides Goodwill an option to purchase the store at fair market value if the landlord has a bona fide offer from a third party. Fair market value is the price offered by a third party in an arms-length transaction. Goodwill's management cannot determine if it would elect to purchase any of the stores for which it has a right of first refusal.

Goodwill leases office equipment. Rent expense under these leases was $486,390 and $118,317 for 2015 and 2014, respectively.

Goodwill leases vehicles, equipment and drivers used in operations. The leases expire in March 2021. Fixed lease costs are $9,222 weekly and variable costs are $0.1625 per mile driven. Labor rates for drivers vary from $19.90 to $21.61 per straight-time hour. Goodwill's expense under these leases was $1,466,325 and $1,739,286 for 2015 and 2014, respectively.

GEI leases one of its locations from GICI and the rest from third parties. Aggregate rental expense for 2015 and 2014 was $1,223,157 and $1,279,390, respectively. The lease agreements have terms of up to 10 years from the lease commencement date and certain leases have one or more renewal options for up to an additional five years per option.

Future minimum rental payments required under operating leases that have initial or remaining lease terms as of January 02, 2016 are as follows for the fiscal years ending:

| | |
|---|---|
| 2016 | $ 11,525,908 |
| 2017 | 10,897,050 |
| 2018 | 9,836,320 |
| 2019 | 8,986,348 |
| 2020 | 8,125,209 |
| Thereafter | 26,318,323 |
| | $ 75,689,158 |

Prior to year-end, Goodwill signed leases for two retail stores and an Excel Center location. As the properties were not yet available for occupancy at the date the financial statements were available to be issued, these leases have been excluded from the schedule of future minimum lease payments.

## 11. Retirement Plan

Goodwill maintains a discretionary thrift plan which allows eligible employees to contribute pre-tax gross income subject to certain IRS limitations. Goodwill matches 100% of eligible employees' pre-tax contributions up to 6% of gross income. Goodwill may also make additional discretionary contributions to the plan. Employer matching contributions vest after three years or in the event of death or disability. Employer discretionary contributions vest after five years or in the event of death or disability. Goodwill's expense relating to contributions to the thrift plan for 2015 and 2014 was $1,314,318 and $1,526,584, respectively.

## 12. Related Party Transactions

Goodwill Industries Foundation of Central Indiana, Inc. (the "Foundation") has common management with Goodwill and provides grant support for Goodwill and GEI. The accompanying financial statements of Goodwill have not been consolidated with those of the Foundation due to less than a majority voting interest and lack of controlling financial interest between the two organizations.

At January 02, 2016 and January 03, 2015, the Foundation had net assets of $31.3 million and $30.0 million, respectively, comprised primarily of equity mutual fund investments, equity hedge funds and alternative investments consisting of private equity and natural resource funds. For 2015 and 2014, the Foundation paid grants to Goodwill of $1,126,926 and $952,251, respectively, which is included in "support" on the Statement of Activities. The Foundation also reimburses Goodwill for certain fundraising expenses and pays Goodwill a management fee. This reimbursement and management fee totaled $773,321 and $537,346 for 2015 and 2014, respectively. Included in other receivables at January 02, 2016 and January 03, 2015 is $85,181 and $252,300, respectively, due from the Foundation for grants receivable from the Foundation, reimbursement of fundraising expenses incurred by Goodwill and expenses of the Foundation paid by Goodwill.

GEI leases an Excel Center facility owned by an entity controlled by a GICI board member. The lease for the facility has a 10-year term with a provision that allows early termination if the Excel Center's charter is not renewed when it expires in 2017 and has a rent rate comparable to similar facilities in the same geographic area. The lease became effective January 1, 2012. The board member recused himself from all board of directors' discussion and voting related to the lease transaction.

In February 2014, Goodwill issued tax-exempt bonds through the Indiana Finance Authority (IFA). A Goodwill board member also serves on the board of the IFA. The board member recused himself from all Goodwill and IFA board of directors' discussion and voting related to the bond transaction.

## 13. Future Grant Audits

Under the terms of federal grants awarded to Goodwill, periodic audits are required and certain costs may be challenged as to allowability under the terms of the grants. Such audits could lead to reimbursement to the grantor. Management believes the likelihood that material costs incurred by Goodwill will be disallowed is remote.

## 14. SELF INSURANCE

Goodwill self insures for employee and dependent medical benefits up to a per-individual annual maximum of $100,000 and an aggregate maximum of approximately $5.8 million. Goodwill purchases reinsurance which pays individual claims that exceed $100,000 per year, in accordance with the provisions of the Affordable Care Act. The reinsurer reviews claims annually and upon renewal of the reinsurance policy each year may establish higher specific maximums on selected individuals with high claims risks. Goodwill purchases claims administration services from a third party administrator. Self insured medical expenses and related administrative costs were $4,884,810 and $6,139,769 for 2015 and 2014, respectively.

Goodwill maintains an estimated liability for incurred but not reported medical claims based on average claim costs and claims processing lag times. At January 02, 2016 and January 03, 2015, the estimated liability was $792,968 and $1,108,870, respectively, and is included in accrued liabilities in the statement of financial position.

## 15. FAIR VALUE MEASUREMENTS

Accounting Standards for Fair Value Measurement define fair value as the price that would be received for an asset or paid to transfer a liability (exit price) in an orderly transaction between market participants at the measurement date. Those standards also establish a three-level fair value hierarchy for disclosure that prioritizes valuations based on whether the significant inputs used to estimate fair value are observable, giving highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and lowest priority to valuations primarily based on unobservable inputs (level 3 measurements). Level 1 inputs are quoted prices (unadjusted) in active markets for identical assets or liabilities that the reporting entity has the ability to access at the measurement date. Level 2 inputs are inputs other than quoted prices included within Level 1 that are observable for the asset or liability, either directly or indirectly. Level 3 inputs are unobservable inputs for the asset or liability. Fair values measured on a recurring basis at January 02, 2016 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 3,446,329 | $ 3,446,329 | $ - | $ - |
| Interest rate swap | $ (167,591) | $ - | $ (167,591) | $ - |

## 15. FAIR VALUE MEASUREMENTS, CONTINUED

Fair values measured on a recurring basis at January 03, 2015 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 4,406,561 | $ 4,406,561 | $ - | $ - |
| Interest rate swap | $ (289,714) | $ - | $ (289,714) | $ - |

Fair values for investments are determined by reference to readily available quoted market prices and other relevant information generated by market transactions. Fair value for the interest rate swap is determined by the prevailing one-month LIBOR rate at the valuation date. These methodologies have not changed since the prior year.

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## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

FOR THE YEAR ENDED JANUARY 02, 2016

| FEDERAL GRANTOR/PASS-THROUGH GRANTOR/PROGRAM TITLE | Federal CFDA Number | Agency or Pass-Through Number | Federal Expenditures |
|---|---|---|---|
| **U.S. DEPARTMENT OF LABOR** | | | |
| Indianapolis Private Industry Council | | | |
| *Jobs for America's Graduates (JAG) Program* | 17.259 | S0704-WI-12-Y Mod 1 | $ 408,101 |
| Goodwill Industries International | | | |
| *Senior Community Service Employment Program* | 17.235 | SCSEP-PY 14/15 Subgrant | 2,318,684 |
| **U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES** | | | |
| Indiana State Department of Health | | | |
| *Affordable Care Act - Maternal, Infant and Early Childhood Home Visiting Program - Nurse Family Partnership* | 93.505 | A70-4-069740 | 77,825 |
| | | A70-4-069741 | 67,837 |
| | | A70-5-069798 | 582,082 |
| | | A70-5-069804 | 2,676,290 |
| | | 13475 | 604,679 |
| | | | 4,008,713 |
| *Title V Maternal and Child Health Services Block Grant* | 93.994 | 13475 | 193,623 |
| *Total expenditures of federal awards* | | | $ 6,929,121 |

## NOTE TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

### 1. BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal award activity of Goodwill Industries of Central Indiana, Inc. and subsidiaries (Goodwill) under programs of the federal government for the year ended January 02, 2016. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of Goodwill, it is not intended to and does not present the financial position, changes in net assets, or cash flows of Goodwill.

### 2 SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Goodwill has elected to use the 10 percent de minimis indirect cost rate as allowed under the Uniform Guidance.

See independent auditors' report.

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GREENWALT CPAs

## Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*

### Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States of America, the consolidated financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries (Goodwill), which comprise the consolidated statement of financial position as of January 02, 2016, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to consolidated financial statements, which collectively comprise Goodwill's basic consolidated financial statements, and have issued our report thereon dated February 23, 2016.

### Internal Control Over Financial Reporting

In planning and performing our audit of the consolidated financial statements, we considered Goodwill's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of Goodwill's internal control. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such, that there is a reasonable possibility that a material misstatement of the entity's consolidated financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## Compliance and Other Matters

As part of obtaining reasonable assurance about whether Goodwill's consolidated financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of consolidated financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

## Purpose of this Report

This purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Goodwill's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Greenwalt CPAs, Inc.

February 23, 2016

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REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM
AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

## Report on Compliance for Each Major Federal Program

We have audited Goodwill Industries of Central Indiana, Inc. and subsidiaries' (Goodwill) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Goodwill's major federal programs for the year ended January 02, 2016. Goodwill's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Goodwill's basic financial statements include the operations of Goodwill Education Initiatives, Inc. (GEI) which received $1,562,845 in federal awards which is not included in the schedule of expenditures of federal awards during the year ended January 02, 2016. Our audit, described below, did not include the operations of GEI because the entity's June 30 financial statements are audited at the Charter School Organizer level in accordance with *Government Auditing Standards* and Uniform Guidance.

## Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

## Auditors' Responsibility

Our responsibility is to express an opinion on compliance for Goodwill's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Goodwill's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Goodwill's compliance.

## Opinion on Each Major Federal Program

In our opinion, Goodwill complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended January 02, 2016.

## Report on Internal Control Over Compliance

Management of Goodwill is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Goodwill's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Greenwalt CPAs, Inc.

February 23, 2016

## A. SUMMARY OF AUDITORS' RESULTS

### FINANCIAL STATEMENTS

1. Type of auditors' report issued: Unmodified

2. Internal control over financial reporting:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

3. Noncompliance material to financial statements noted? _____yes ___x___no

### FEDERAL AWARDS

4. Internal control over major programs:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

5. Type of auditors' report issued on compliance for major programs: Unmodified

6. Any audit findings disclosed that are required to be reported in accordance with 2 CFR section 200.516(a)? _____yes ___x___no

7. Identification of major programs:

| CFDA Number | Name of Federal Program or Cluster |
|---|---|
| 93.505 | Affordable Care Act - Maternal, Infant, and Early Childhood Visiting Program |
| 93.994 | Title V Maternal and Child Health Services Block Grant |

8. Dollar threshold used to distinguish between type A and type B programs: $ 750,000

9. Auditee qualified as low-risk auditee? ___x___yes _____no

## B. FINDINGS - FINANCIAL STATEMENT AUDIT

None

## C. FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAMS AUDIT

None

See independent auditors' report on compliance for each major federal program and on internal control over compliar

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To the Boards of Directors and Management of
Goodwill Industries of Central Indiana, Inc. and subsidiaries and
Goodwill Industries Foundation of Central Indiana, Inc.:

In planning and performing our audit of the combining financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries and Goodwill Industries Foundation of Central Indiana, Inc. (collectively referred to as the Organizations) as of and for the year ended January 03, 2015, in accordance with auditing standards generally accepted in the United States of America, we considered the Organizations' internal control over financial reporting (internal control) as a basis for designing our auditing procedures for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organizations' internal control. Accordingly, we do not express an opinion on the effectiveness of the Organizations' internal control.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be significant deficiencies or material weaknesses and therefore there can be no assurance that all such deficiencies have been identified.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A material weakness is a deficiency or combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. We did not identify any deficiencies in internal control that we consider to be material weaknesses.

The purpose of this communication is solely to describe the scope of our testing of internal control over financial reporting and the results of that testing. This communication is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organizations' internal control over financial reporting. Accordingly, this communication is not suitable for any other purpose.

Greenwalt CPAs, Inc.

March 5, 2015

# GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED FINANCIAL STATEMENTS

Together with Independent Auditors' Report

JANUARY 03, 2015

GREENWALT CPAs

We Deliver Peace of Mind

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# Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

## Report on the Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of Goodwill Industries of Central Indiana, Inc. (an Indiana non-profit corporation) and subsidiaries (Goodwill) which comprise the consolidated statement of financial position as of January 03, 2015, and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and related notes to the consolidated financial statements.

## Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

## Auditors' Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the consolidated financial position of Goodwill as of January 03, 2015 and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

## Report on Summarized Comparative Information

We have previously audited Goodwill's December 28, 2013 financial statements and our report dated February 27, 2014, expressed an unmodified opinion on those financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended December 28, 2013, is consistent, in all material respects, with the audited financial statements from which it has been derived.

## Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The schedule of expenditures of federal awards, as required by the *Office of Management and Budget Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations* is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

## Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated February 26, 2015, on our consideration of Goodwill's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill Industries of Central Indiana, Inc. and subsidiaries' internal control over financial reporting and compliance.

Greenwalt CPAs, Inc.

March 5, 2015

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF FINANCIAL POSITION

JANUARY 03, 2015 WITH SUMMARIZED COMPARATIVE INFORMATION AS OF DECEMBER 28, 2013

| ASSETS | Unrestricted | Temporarily Restricted | Eliminations | Totals January 03, 2015 | Totals December 28, 2013 |
|---|---|---|---|---|---|
| **CURRENT ASSETS** | | | | | |
| Cash and cash equivalents | $ 5,980,304 | $ 66,229 | $ - | $ 6,046,533 | $ 5,701,677 |
| Trade accounts receivable, net | 4,736,640 | - | - | 4,736,640 | 2,252,000 |
| Charter school accounts receivable | - | - | - | - | 874,417 |
| Other receivables, net | 499,550 | - | - | 499,550 | 1,863,677 |
| Inventories | 4,437,252 | - | - | 4,437,252 | 4,278,713 |
| Prepayments | 1,613,537 | - | - | 1,613,537 | 761,579 |
| Due from other funds | - | 10,878 | (10,878) | - | - |
| *Total current assets* | 17,267,283 | 77,107 | (10,878) | 17,333,512 | 15,732,063 |
| **LONG-TERM ASSETS** | | | | | |
| Land and improvements | 12,494,728 | - | - | 12,494,728 | 11,170,860 |
| Buildings and improvements | 44,323,491 | - | - | 44,323,491 | 36,428,967 |
| Equipment | 33,563,547 | - | - | 33,563,547 | 30,978,776 |
| Projects in progress | 1,139,354 | - | - | 1,139,354 | 2,357,718 |
| | 91,521,120 | - | - | 91,521,120 | 80,936,321 |
| Accumulated depreciation | (36,260,753) | - | - | (36,260,753) | (33,137,956) |
| *Net property and equipment* | 55,260,367 | - | - | 55,260,367 | 47,798,365 |
| Investments | 4,406,561 | - | - | 4,406,561 | 5,055,024 |
| Deposits | 25,000 | - | - | 25,000 | - |
| Other assets | 139,020 | - | - | 139,020 | 90,664 |
| *Total long-term assets* | 59,830,948 | - | - | 59,830,948 | 52,944,053 |
| | $ 77,098,231 | $ 77,107 | $ (10,878) | $ 77,164,460 | $ 68,676,116 |
| **LIABILITIES AND NET ASSETS** | | | | | |
| **CURRENT LIABILITIES** | | | | | |
| Bank line of credit | $ 650,000 | $ - | $ - | $ 650,000 | $ 2,006,500 |
| Current portion of bonds and notes payable | 1,100,450 | - | - | 1,100,450 | 1,182,623 |
| Accounts payable | 6,332,554 | - | - | 6,332,554 | 7,214,070 |
| Accrued liabilities | 4,404,688 | - | - | 4,404,688 | 3,606,251 |
| Due to other funds | 10,878 | - | (10,878) | - | - |
| *Total current liabilities* | 12,498,570 | - | (10,878) | 12,487,692 | 14,009,444 |
| **LONG-TERM LIABILITIES** | | | | | |
| Bonds and notes payable | 17,137,518 | - | - | 17,137,518 | 8,327,968 |
| Other long-term liabilities | 453,356 | - | - | 453,356 | 637,571 |
| *Total long-term liabilities* | 17,590,874 | - | - | 17,590,874 | 8,965,539 |
| *Total liabilities* | 30,089,444 | - | (10,878) | 30,078,566 | 22,974,983 |
| **COMMITMENTS AND CONTINGENCIES (NOTES 8, 11, 12 AND 14)** | | | | | |
| **NET ASSETS** | 47,008,787 | 77,107 | - | 47,085,894 | 45,701,133 |
| | $ 77,098,231 | $ 77,107 | $ (10,878) | $ 77,164,460 | $ 68,676,116 |

See accompanying notes to financial statements.

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED JANUARY 03, 2015

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED DECEMBER 28, 2013

| | | | Totals | |
|---|---|---|---|---|
| | Unrestricted | Temporarily Restricted | January 03, 2015 | December 28, 2013 |
| **REVENUE** | | | | |
| Sales - donated goods | $ 77,015,877 | $ - | $ 77,015,877 | $ 73,559,846 |
| Sales - purchased goods | 3,071,472 | - | 3,071,472 | 7,025,107 |
| Commercial services | 14,964,845 | - | 14,964,845 | 14,389,061 |
| Mission advancement | 7,022,674 | - | 7,022,674 | 6,893,985 |
| Education services | 24,278,863 | - | 24,278,863 | 21,072,886 |
| Interest and dividend income | 65,569 | - | 65,569 | 90,735 |
| Realized gain (loss) on investments | (28,922) | - | (28,922) | 10,946 |
| Unrealized gain (loss) on investments | 13,978 | - | 13,978 | (94,711) |
| Net loss on disposition of property | (112,558) | - | (112,558) | (176,233) |
| Gain on interest rate swap hedge | 141,107 | - | 141,107 | 204,208 |
| Other, net | 1,439,919 | - | 1,439,919 | 929,821 |
| *Total revenue* | 127,872,824 | - | 127,872,824 | 123,905,651 |
| **SUPPORT** | | | | |
| United Way of Central Indiana, Inc. | | | | |
| Allocation | 400,573 | - | 400,573 | 383,311 |
| Annual and capital campaign contributions | 10,170 | - | 10,170 | 11,675 |
| Other contributions | 703,888 | - | 703,888 | 1,789,038 |
| *Total support* | 1,114,631 | - | 1,114,631 | 2,184,024 |
| **NET ASSETS RELEASED FROM RESTRICTIONS** | 94,306 | (94,306) | - | - |
| *Total revenue and support* | 129,081,761 | (94,306) | 128,987,455 | 126,089,675 |
| **EXPENSES** | | | | |
| Retail and commercial services | 80,532,867 | - | 80,532,867 | 80,406,878 |
| Mission advancement | 7,563,695 | - | 7,563,695 | 7,404,410 |
| Education services | 24,475,694 | - | 24,475,694 | 19,843,680 |
| General and administrative | 14,537,771 | - | 14,537,771 | 13,584,807 |
| Fundraising | 492,667 | - | 492,667 | 517,433 |
| *Total expenses* | 127,602,694 | - | 127,602,694 | 121,757,208 |
| **CHANGE IN NET ASSETS, BEFORE EXTRAORDINARY ITEM** | 1,479,067 | (94,306) | 1,384,761 | 4,332,467 |
| **EXTRAORDINARY ITEM (NOTES 1 AND 6E):** | | | | |
| **NET LOSS DUE TO CHANGE IN STATE REGULATION** | - | - | - | (1,068,594) |
| **CHANGE IN NET ASSETS, AFTER EXTRAORDINARY ITEM** | 1,479,067 | (94,306) | 1,384,761 | 3,263,873 |
| **NET ASSETS, BEGINNING OF YEAR** | 45,529,720 | 171,413 | 45,701,133 | 42,437,260 |
| **NET ASSETS, END OF YEAR** | $ 47,008,787 | $ 77,107 | $ 47,085,894 | $ 45,701,133 |

See accompanying notes to financial statements.

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

FOR THE YEAR ENDED JANUARY 03, 2015

WITH SUMMARIZED COMPARATIVE INFORMATION FOR THE YEAR ENDED DECEMBER 28, 2013

| | Retail and Commercial Services | Mission Advancement | Education Services | General and Administrative | Fundraising | Totals | |
|---|---|---|---|---|---|---|---|
| | | | | | | January 03, 2015 | December 28, 2013 |
| Salaries and wages | $ 33,242,304 | $ 5,238,649 | $ 11,782,063 | $ 7,901,094 | $ 328,452 | $ 58,492,562 | $ 54,812,391 |
| Employee benefits | 9,161,925 | 1,130,599 | 4,244,656 | 1,883,454 | 77,315 | 16,497,949 | 13,592,594 |
| Professional services | 3,507,913 | 336,314 | 195,132 | 1,106,963 | 9,990 | 5,156,312 | 5,291,890 |
| Supplies | 4,929,719 | 106,852 | 284,539 | 254,615 | 7,165 | 5,582,890 | 5,675,224 |
| Cost of sales | 7,433,150 | - | - | - | - | 7,433,150 | 9,750,072 |
| Occupancy | 16,291,735 | 362,637 | 2,984,070 | 1,532,223 | 21,629 | 21,192,294 | 19,416,345 |
| Advertising and printing | 724,729 | 5,471 | 160,223 | 501,246 | 15,502 | 1,407,171 | 1,494,840 |
| Travel and transportation | 1,541,484 | 196,961 | 422,554 | 252,782 | 19,976 | 2,433,757 | 2,412,998 |
| Staff development | 5,091 | 36,234 | 76,548 | 56,978 | - | 174,851 | 227,392 |
| Memberships and dues | 6,234 | 2,016 | 7,433 | 213,533 | 3,291 | 232,507 | 297,902 |
| Client tuition, training and assistance | 160 | 27,846 | 23,853 | 687 | - | 52,546 | 93,280 |
| Student services | - | - | 1,688,377 | - | - | 1,688,377 | 1,870,066 |
| Depreciation and amortization | 2,913,288 | 72,049 | 2,394,567 | 703,765 | 4,079 | 6,087,748 | 5,806,072 |
| Bad debt expense | 97,804 | - | - | - | - | 97,804 | 45,534 |
| Interest expense | 305,064 | - | 139,854 | - | - | 444,918 | 340,981 |
| Other | 372,267 | 48,067 | 71,825 | 130,431 | 5,268 | 627,858 | 629,627 |
| | $ 80,532,867 | $ 7,563,695 | $ 24,475,694 | $ 14,537,771 | $ 492,667 | $ 127,602,694 | $ 121,757,208 |

See accompanying notes to financial statements.

GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES
CONSOLIDATED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JANUARY 03, 2015 AND DECEMBER 28, 2013

## INCREASE IN CASH AND CASH EQUIVALENTS

| | January 03, 2015 | December 28, 2013 |
|---|---|---|
| **CASH FLOWS FROM OPERATING ACTIVITIES** | | |
| Change in net assets | $ 1,384,761 | $ 3,263,873 |
| Depreciation and amortization | 6,087,748 | 5,806,072 |
| Forgiveness of Common School Fund Loans and accrued interest | - | (4,855,727) |
| Write-off of Basic Grant Receivable | - | 5,924,321 |
| Gain on interest rate swap hedge | (141,107) | (204,208) |
| Realized (gain) loss on investments | 28,922 | (10,946) |
| Unrealized (gain) loss on investments | (13,978) | 94,711 |
| Net loss on disposition of property | 112,558 | 176,233 |
| *(Increase) decrease in operating assets:* | | |
| Trade accounts receivable | (2,484,640) | 312,228 |
| Charter school accounts receivable | 874,417 | 728,591 |
| Other receivables | 1,364,127 | (583,622) |
| Inventories | (158,539) | (72,540) |
| Prepayments | (851,958) | 44,156 |
| Deposits | (25,000) | 37,803 |
| Other assets | (48,356) | 6,974 |
| *Increase (decrease) in operating liabilities:* | | |
| Accounts payable and accrued liabilities | (83,079) | (590,785) |
| Other long-term liabilities | (43,108) | (43,108) |
| *Net cash provided by operating activities* | 6,002,768 | 10,034,026 |
| **CASH FLOWS FROM INVESTING ACTIVITIES** | | |
| Purchases of investments | (4,453,767) | (1,390,637) |
| Proceeds from sales of investments | 5,087,286 | 1,699,132 |
| Proceeds from sales of fixed assets | 2,158,187 | 3,222 |
| Capital expenditures | (15,820,495) | (8,119,489) |
| *Net cash used in investing activities* | (13,028,789) | (7,807,772) |
| **CASH FLOWS FROM FINANCING ACTIVITIES** | | |
| Borrowing (repayments) on line of credit, net | (1,356,500) | 1,329,500 |
| Proceeds from bonds and notes payable | 10,500,000 | 724,554 |
| Principal payments on bonds and notes payable | (1,772,623) | (855,741) |
| *Net cash provided by financing activities* | 7,370,877 | 1,198,313 |
| **INCREASE IN CASH AND CASH EQUIVALENTS** | 344,856 | 3,424,567 |
| **CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR** | 5,701,677 | 2,277,110 |
| **CASH AND CASH EQUIVALENTS, END OF YEAR** | $ 6,046,533 | $ 5,701,677 |
| **SUPPLEMENTAL CASH FLOWS INFORMATION** | | |
| Cash paid for interest | $ 370,112 | $ 263,454 |

See accompanying notes to financial statements.

## 1. Summary of Significant Accounting Policies

### Principles of Consolidation

These consolidated financial statements include the accounts of Goodwill Industries of Central Indiana, Inc. and its subsidiary companies. The term "Goodwill" used herein means Goodwill Industries of Central Indiana, Inc. and its subsidiaries, unless otherwise indicated by the context. All material inter-company accounts and transactions have been eliminated.

### Description of Organization

Goodwill Industries of Central Indiana, Inc. ("GICI") and its subsidiaries, GW Commercial Services, Inc. ("GWCS") and Goodwill Education Initiatives, Inc. ("GEI") (collectively referred to as "Goodwill") are Indiana non-profit organizations that offer employment, education and related services to disadvantaged adults and young people throughout central Indiana. Goodwill defines disadvantaged individuals as those with a barrier to employment such as a disability, a criminal history and/or a low education level (less than a high school diploma).

GICI's Retail operation collects donations of used clothing and household items and sells them through a network of 52 thrift stores, three warehouse outlet centers, and two vintage stores. Excess and unsalable donated items are sold through salvage and recycling channels. Unique items, jewelry and books are often sold through e-commerce channels. The Retail operation also accepts and sells donated automobiles, using a third party only for vehicle towing and auction services. The Retail operation employs nearly 2,100 individuals, more than 65% of whom are disabled or disadvantaged. These operations generate revenue and cash flow that fund a large portion of GICI's other mission-related operations and general and administrative expenses.

GICI's Commercial Services ("CS") operation provides a variety of outsource packaging, assembly, and fulfillment services to external customers, employing over 100 disabled and disadvantaged individuals.

GWCS is operated under common management with GICI's Commercial Services operations and provides rehabilitative training and jobs for people who have severe disabilities, primarily through service contracts with various federal governmental entities pursuant to Ability One (formerly known as the Javits-Wagner-O'Day Act of 1971). Ability One requires certain federal governmental entities to purchase selected products and services, via such contracts, from non-profit agencies employing blind or severely disabled individuals. GWCS operates 11 Ability One contracts at government sites in Indianapolis, Indiana, and employs approximately 200 severely disabled individuals.

GICI's Mission Advancement ("MA") operation provides case management, counseling, training, education, job coaching, job placement, and related supportive services, for disabled, disadvantaged, unemployed and under-employed individuals who wish to find and retain employment and increase their economic self-sufficiency. MA also manages programs designed to provide holistic whole-family services to Goodwill's low-wage workers and students, as well as to first-time expectant mothers and their families. The CS and MA segments of GICI are funded by a combination of contracts with external customers, service contracts with federal and state governmental entities, United Way grants, private grants and gifts from individuals and foundations, and subsidies from GICI's Retail operation.

## 1. Summary of Significant Accounting Policies, Continued

### Description of Organization, Continued

GEI provides educational opportunities designed to enable young people and adults to prepare for more productive lives. GEI operates public charter high schools in central Indiana under the provisions of the Indiana Charter School laws and the chartering authorities of the Mayor of Indianapolis and the Indiana Charter School Board. The following table provides more information regarding GEI's charter schools.

| School Name | School Location | Chartering Authority | Number of Years in Operation | Student Enrollment at January 03, 2015 |
|---|---|---|---|---|
| Indianapolis Metropolitan High School | Indianapolis, IN (at GICI headquarters facility) | Mayor of Indianapolis | 11 | 268 |
| The Excel Center for Adult Learners | Four locations in Indianapolis, IN, including one at GICI headquarters facility | Mayor of Indianapolis | 4 | 1,121 |
| The Excel Center-Anderson | Anderson, IN | Indiana Charter School Board | 3 | 329 |
| The Excel Center – Kokomo | Kokomo, IN | Indiana Charter School Board | 2 | 305 |
| The Excel Center – Lafayette | Lafayette, IN | Indiana Charter School Board | 2 | 267 |
| The Excel Center – Richmond | Richmond, IN | Indiana Charter School Board | 2 | 268 |
| The Excel Center – West | Indianapolis, IN | Mayor of Indianapolis | 2 | 330 |

The schools contract with GICI for certain business support services, including marketing, human resources, finance, technology and facilities management. The schools receive the majority of their funding from the Indiana Department of Education. Their revenues are supplemented with funds from the United States Department of Education, private grants, gifts, and support from GICI. Indianapolis Metropolitan High School (the Met) primarily serves at-risk students in grades 9-12. The Excel Centers primarily serve adults who previously dropped out of high school and are seeking their high school diplomas rather than a GED.

## 1. Summary of Significant Accounting Policies, Continued

### Description of Organization, Continued

Goodwill is a member of Goodwill Industries International, Inc. (GII). Goodwill operates autonomously and reports its financial results independent of GII or any other affiliated entity. Goodwill operates in a geographic territory assigned to it by GII encompassing 29 counties in central Indiana.

Goodwill is a member agency of United Way of Central Indiana, Inc. In 2014 and 2013, Goodwill received United Way grants of $400,573 and $383,311, respectively.

### Basis of Accounting And Use of Estimates

The accompanying financial statements were prepared on the accrual basis of accounting. The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America (GAAP) requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of support, revenues and expenses during the reporting period. For annual financial reporting purposes, Goodwill utilizes a 52-week period ending on the Saturday closest to December 31.

### Summarized Comparative Information

The financial statements include certain prior year summarized comparative information in total, but not by net asset class and functional expense class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP. Accordingly, such information should be read in conjunction with Goodwill's financial statements for the year ended December 28, 2013, from which the summarized information was derived.

### Cash and Cash Equivalents

Goodwill considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents. Goodwill maintains cash balances at commercial banks. Accounts at the banks are guaranteed by the Federal Deposit Insurance Corporation (FDIC) up to $250,000. At January 03, 2015, Goodwill maintained cash and cash equivalents in excess of the FDIC coverage limits.

### Trade and Charter School Accounts Receivable

Trade accounts receivable are unsecured customer obligations generally requiring payment within 30 days of the invoice date.

Accounts receivable are stated at the amount billed to the customer or at amounts determined by public statute. Generally, customer account balances with invoices dated over 30 days are considered delinquent.

## 1. Summary of Significant Accounting Policies, Continued

### Trade and Charter School Accounts Receivable, Continued

Payments of accounts receivable are allocated to the specific invoices identified on the customer's remittance advice or, if unspecified, are applied to the earliest unpaid invoices.

The carrying amount of accounts receivable is reduced by a valuation allowance that reflects management's best estimate of the amounts that will not be collected. Management individually reviews all accounts receivable balances that are past due and based on an assessment of current creditworthiness and other factors, estimates the portion, if any, of the balance that will not be collected.

Prior to June 30, 2013, the Indiana Department of Education funded charter schools on a six-month arrearage basis. In 2013, the State of Indiana amended the manner in which it funds charter schools, eliminating the former six-month lag. Beginning in July 2013, GEI's charter schools receive their State funding on a current basis. The effect of this change in funding resulted in the writeoff of the amounts receivable under the prior funding schedule. The amount of the writeoff, which is reflected in the Extraordinary Item on the Statement of Activities, was $5,924,321.

### Inventories

The retail store and e-commerce operations of Goodwill contain donated inventories. These items have little or no economic value to Goodwill when first received and therefore are not recorded at the time of donation. Donated goods are sold through retail store, e-commerce, salvage and recycling sales channels. Costs included in donated goods inventory include those incurred to collect, transport and process donated items to place them for sale in Goodwill's retail stores, e-commerce operations, or to salvage and recycling dealers. Retail store, e-commerce, recycling and salvage sales are reflected in the statement of activities as sales - donated goods. The Retail operations of Goodwill also contain purchased goods inventories, which are stated at the lower of cost or market using the specific identification method.

Goodwill's commercial services operation has purchased inventories generally classified as raw material, work in process and finished goods. These inventories are valued in the financial statements at standard cost. Cost of sales is included in retail and commercial services expenses in the statement of functional expenses.

### Property and Equipment

Property and equipment are recorded at historical cost. Donated property is recorded at the estimated fair market value at the date of donation. Depreciation is computed on the straight-line method over estimated useful lives ranging from 10 to 40 years for buildings and building improvements, and from 3 to 10 years for equipment and other capital assets. Leasehold improvements are depreciated over a period of time not exceeding the life of the corresponding property lease. Material property additions and improvements are capitalized and expenditures for normal maintenance and repairs are expensed as incurred.

Goodwill accumulates certain costs for capital projects until the projects are placed in service, at which time they become depreciable fixed assets. Goodwill's statement of financial position reflected projects in progress totaling $1,139,354 and $2,357,718 at January 03, 2015 and December 28, 2013, respectively.

## 1. Summary of Significant Accounting Policies, Continued

### Other Assets

In December 2006, Goodwill issued $12 million of tax-exempt bonds to finance several capital projects and to refinance prior bond debt at a lower interest rate. Transaction costs for the bond issuance totaled $139,483 and are being amortized over the life of the bonds and the supporting letter of credit. In February 2014, Goodwill issued $10.5 million of tax-exempt bonds to finance several capital projects. Transaction costs for the bond issuance totaled $58,000 and are being amortized over the life of the bonds. The amortization costs are included in interest expense on the statement of functional expenses.

### Net Assets

Goodwill maintains the following classifications of net assets:

#### Unrestricted

These include revenue and expenses from the regular operations of Goodwill, which are at the discretion of management and the Board of Directors.

#### Temporarily Restricted

These include donations and grant revenues used to meet expenses of current operations in accordance with restrictions specified by the donors or grantors.

### Contributions

Contributions are recognized when the donor makes an unconditional promise to give to Goodwill and are recorded at their fair values as revenues and assets in the period received. Contributions that are restricted by the donor are reported as increases in unrestricted net assets if the restrictions expire in the year in which the contributions are recognized. All other donor-restricted contributions are reported as increases in temporarily restricted net assets. When a restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets.

### Expense Allocation

Expenses have been classified as retail and commercial services, mission advancement, education services, general and administrative, and fundraising. Goodwill uses actual direct expenditures and cost allocations, based on estimates of time and usage by Goodwill personnel and programs, to classify its expenses.

### Advertising

Advertising and printing expenses totaled $1,407,171 in 2014 and $1,494,840 in 2013. Goodwill's policy is to record advertising expenditures in the period in which they are incurred.

## 1. Summary of Significant Accounting Policies, Continued

### Subsequent Events

Subsequent events have been considered through February 26, 2015, which was the date the financial statements were available to be issued. See Note 14.

## 2. Tax Status

Goodwill and its subsidiaries are Indiana non-profit corporations, exempt from income tax under Section 501(c)(3) of the U.S. Internal Revenue Code. However, if income was generated from certain activities not directly related to Goodwill's tax-exempt purposes, such income would be subject to taxation as unrelated business income. Goodwill and its subsidiaries are not considered private foundations as defined in Section 509(a) of the Internal Revenue Code.

Accounting Standards for Income Taxes provide detailed guidance for the financial statement recognition, measurement and disclosure of uncertain tax positions recognized in an enterprise's financial statements. Goodwill regularly evaluates its activities to determine that they are in compliance with its tax-exempt purpose. Currently, Goodwill's management does not believe it is engaged in any activities that would create an uncertain tax position. Goodwill is no longer subject to examination by taxing authorities for years before 2011.

## 3. Trade Accounts Receivable

Trade accounts receivable are summarized as follows:

| | Janaury 03, 2015 | December 28, 2013 |
|---|---|---|
| Trade accounts receivable | $ 4,903,794 | $ 2,362,153 |
| Less – allowance for uncollectible accounts | (167,154) | (110,153) |
| Trade accounts receivable, net | $ 4,736,640 | $ 2,252,000 |

## 4. Inventories

Inventories are summarized as follows:

| | Janaury 03, 2015 | December 28, 2013 |
|---|---|---|
| Donated goods | $ 3,788,730 | $ 3,671,353 |
| Purchased goods | 648,522 | 607,360 |
| | $ 4,437,252 | $ 4,278,713 |

## 5. INVESTMENTS

Goodwill's investments in equity securities with readily determinable fair values and all investments in debt securities are stated at fair value in the statements of financial position (see Note 13). Realized and unrealized gains and losses are reported in the statement of activities.

Goodwill held the following investment securities at:

| | January 03, 2015 | December 28, 2013 |
|---|---|---|
| Mutual funds – market value | $ 4,406,561 | $ 5,055,024 |
| Mutual funds – cost basis | $ 4,401,734 | $ 5,036,219 |

## 6. BONDS AND NOTES PAYABLE

a. Goodwill has a committed line of credit with a commercial bank, expiring September, 2015. This line of credit provides for maximum borrowings of $5,000,000 and bears interest at one-month LIBOR plus 1.75% (a total of 1.91% at January 3, 2015). As of January 03, 2015 and December 28, 2013, Goodwill had $650,000 and $960,000, respectively, outstanding on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2014 and 2013, Goodwill paid $6,806 and $5,846, in non-use fees, respectively.

   GEI has a line of credit with a commercial bank, which expires September, 2015. This line of credit provides for maximum borrowings of $2,500,000 and bears interest at one-month LIBOR plus 2.50% (a total of 2.66% at January 3, 2015). As of January 03, 2015 and December 28, 2013, GEI had $0 and $1,046,500, respectively, outstanding on the line of credit. The line of credit includes a non-use fee of 0.15% of the unused balance. In 2014 and 2013, GEI paid $2,888 and $1,711 in non-use fees. The GEI line of credit is guaranteed by Goodwill.

   Consolidated line of credit balances were $650,000 and $2,006,500 at January 03, 2015 and December 28, 2013, respectively.

b. In 1996, Goodwill issued $8.8 million of tax-exempt long-term bonds. The bonds bore interest at an adjustable interest rate and re-priced every seven days based on market conditions. The interest rate approximates the quoted weekly Securities Industry and Financial Markets Association (SIFMA) Index rate. During 2014, the interest rate on the bonds ranged from 0.09% to 0.18%. Annually on June 1, Goodwill was required to make principal payments of $440,000. In prior years, Goodwill sold retail stores that were originally financed with the 1996 bond issue. As a result, Goodwill repaid additional bond principal upon closing the sales transactions, which represented the prorated amount of then-outstanding bond debt related to the buildings that were sold. The bonds were completely extinguished in 2014. The outstanding balance of the bonds payable at January 03, 2015 and December 28, 2013 was $0 and $430,000, respectively.

## 6. Bonds and Notes Payable, Continued

Goodwill maintained a direct-pay letter of credit facility with a commercial bank that secured Goodwill's 1996 tax-exempt bonds. Goodwill paid fees equal to 55 basis points in 2014 (through June, when the bonds were extinguished) and 2013 to the bank to maintain the letter of credit. During 2014 and 2013, Goodwill paid $592 and $3,436, respectively, which is included in interest expense in the statement of functional expenses.

Goodwill paid remarketing fees to a third party remarketing agent for the 1996 bonds, equal to 0.125% of the amount of bonds traded each year. Goodwill paid $0 and $201 of remarketing fees in 2014 and 2013, respectively.

c. In December 2006, Goodwill issued $12 million of tax-exempt long-term bonds, the proceeds of which were used to build 2 new retail stores, refinance then-existing debt, and remodel Goodwill's Indianapolis headquarters campus to accommodate new charter high school space and related ancillary facilities. The bonds bear interest at an adjustable interest rate and currently re-price every seven days based on market conditions. The interest rate approximates the quoted weekly Securities Industry and Financial Markets Association (SIFMA) Index rate. In 2014, the interest rate on the bonds ranged from 0.09% to 0.19%. Goodwill is required to make annual principal payments of $600,000, through 2027. The outstanding balance of the bonds payable at Janaury 03, 2015 and December 28, 2013 was $7,200,000 and $8,400,000, respectively.

   Goodwill maintains a direct-pay letter of credit facility with a commercial bank that secures Goodwill's 2006 tax exempt bonds. Goodwill paid fees equal to 55 basis points in 2014 and 2013 to the bank to maintain the letter of credit. Goodwill paid letter of credit fees for the 2006 bonds of $44,172 and $47,300 in 2014 and 2013, respectively, which is included in interest expense on the statement of functional expenses.

   Goodwill also pays remarketing fees to a remarketing agent for the 2006 bonds, equal to 0.10% of the amount of bonds outstanding. Goodwill paid $7,853 and $8,451 of remarketing fees in 2014 and 2013, respectively.

d. In February 2014, Goodwill issued $10.5 million of tax-exempt bonds through the Indiana Finance Authority. The bonds have a 20-year term and have a 2.57% fixed interest rate for the first seven (7) years, through March 2, 2021. Goodwill makes monthly interest payments beginning August 1, 2014 and monthly principal and interest payments beginning May 1, 2015. The bonds are held by a commercial bank for the first seven years, after which Goodwill has the right to refinance the then-outstanding principal, renegotiate the interest rate, and/or place the bonds in the open market via a remarketing agent and trustee. The bonds are unrated and are not specifically secured by any collateral or credit enhancement vehicles. Proceeds of the bonds were used to finance construction of four retail stores and significant remodeling at Goodwill's Indianapolis headquarters facility. The outstanding balance of bonds payable under the 2014 issuance at January 03, 2015 was $10,500,000.

e. In prior years, GEI borrowed from the Indiana Common School Fund to finance its charter school operations and costs associated with enrollment growth. During 2013, the Indiana legislature enacted legislation that eliminated all charter school Common School Fund debt, along with associated accrued interest. The amount of the debt forgiveness for GEI's schools totaled $4,627,505, along with $228,222 of forgiven accrued interest. These amounts are reflected in the Extraordinary Item on the Statement of Activities.

## 6. Bonds and Notes Payable, Continued

f. In 2013, GEI opened four new Excel Centers and entered into operating leases for the locations. In two of the locations, tenant improvements were financed through notes payable to commercial banks. The notes require monthly principal and interest payments for five years, through 2018. The duration of the notes matches the length of the respective Excel Center charters.

| Excel Center Location | Original Amount | Interest Rate | Expiration Date | Balance as of January 03, 2015 |
|---|---|---|---|---|
| Lafayette, IN | $274,554 | 5% | 4/1/2018 | $211,377 |
| Kokomo, IN | $450,000 | 5% | 7/1/2018 | $326,591 |

g. Total interest expense as shown on the Statement of Functional Expenses consists of the following:

| | 2014 | 2013 |
|---|---|---|
| Bond, notes payable, and line of credit interest | $ 370,112 | $ 263,454 |
| Letter of credit fees | 47,626 | 54,344 |
| Remarketing fees | 7,853 | 8,652 |
| Bond amortization expenses | 9,633 | 6,974 |
| Line of credit non-use fees | 9,694 | 7,557 |
| Total interest expense | $ 444,918 | $ 340,981 |

h. Goodwill is party to an interest rate swap in order to manage interest rate risk on a portion of its bond debt, the notional amount of which was $4,387,500 at January 03, 2015. The swap agreement provides for Goodwill to pay a fixed interest rate of 3.85% for ten years in exchange for the underlying floating interest rate. At January 03, 2015 and December 28, 2013, the swap had a negative fair value of $289,714 and $430,821, respectively. The fair value of the swap is included in other long-term liabilities on the statement of financial position, and the change in fair value from 2013 to 2014 is recorded as a gain on interest rate swap hedge on the statement of activities.

i. The aggregate maturities of long-term debt are as follows for the following fiscal years:

| | |
|---|---|
| 2015 | $ 1,100,450 |
| 2016 | 1,283,115 |
| 2017 | 1,291,237 |
| 2018 | 1,188,166 |
| 2019 | 1,125,000 |
| Thereafter | 12,250,000 |
| | $ 18,237,968 |

## 7. Temporarily Restricted Net Assets

Temporarily restricted net assets are generated primarily through private grants and are available for youth education.

## 8. Lease Obligations

Goodwill leases 40 retail stores and 7 other buildings used in operations. The lease agreements have terms of up to 15 years, and certain leases have one or more renewal options for up to an additional five years per option. Aggregate rental expense for 2014 and 2013, including common area maintenance charges, totaled $8,829,826 and $8,377,602, respectively. Four of Goodwill's retail store leases contain a right of first refusal. This right provides Goodwill an option to purchase the store at fair market value if the landlord has a bona fide offer from a third party. Fair market value is the price offered by a third party in an arms-length transaction. Goodwill's management cannot determine if it would elect to purchase any of the stores for which it has a right of first refusal.

Goodwill leases office equipment, the agreements for which expire in 2015. Rent expense under these leases was $118,317 and $109,273 for 2014 and 2013, respectively.

Goodwill leases vehicles, equipment and drivers used in operations. The leases expire in March 2021. Fixed lease costs are $9,222 weekly, and variable costs are $0.1625 per mile driven. Labor rates for drivers vary from $19.90 to $21.61 per straight-time hour. Goodwill's expense under these leases was $1,739,286 and $1,508,515 for 2014 and 2013, respectively.

GEI leases one of its locations from GICI and the rest from third parties. The effects of the lease between GEI and GICI have been eliminated in consolidation. Aggregate rental expense for 2014 and 2013 was $1,279,390 and $778,432, respectively. The lease agreements have terms of up to 10 years from the lease commencement date, and certain leases have one or more renewal options for up to an additional five years per option.

Future minimum rental payments required under operating leases that have initial or remaining lease terms as of January 03, 2015 are as follows for the fiscal years ending:

| | | |
|---|---|---|
| 2015 | $ | 11,113,972 |
| 2016 | | 10,941,810 |
| 2017 | | 9,251,387 |
| 2018 | | 7,875,951 |
| 2019 | | 6,755,715 |
| Thereafter | | 15,982,935 |
| | $ | 61,921,770 |

## 9. Retirement Plan

Goodwill maintains a discretionary thrift plan which allows eligible employees to contribute pre-tax gross income subject to certain IRS limitations. Goodwill matches 100% of eligible employees' pre-tax contributions up to 3% of gross income, and 50% of the next 3% of gross income. Goodwill may also make additional discretionary contributions to the plan. Employer matching contributions vest after three years or in the event of death or disability. Employer discretionary contributions vest after five years or in the event of death or disability. Goodwill's expense relating to contributions to the thrift plan for 2014 and 2013 was $1,526,584 and $1,008,481, respectively.

## 10. Related Party Transactions

Goodwill Industries Foundation of Central Indiana, Inc. (the "Foundation") has common management with Goodwill and provides grant support for Goodwill and GEI. The accompanying financial statements of Goodwill have not been consolidated with those of the Foundation due to less than a majority voting interest and lack of controlling financial interest between the two organizations. At January 03, 2015 and December 28, 2013, the Foundation had net assets of $30.0 million and $29.4 million, respectively, comprised primarily of equity mutual fund investments, equity hedge funds, and alternative investments consisting of private equity and natural resource funds. For 2014 and 2013, the Foundation granted to Goodwill $952,251 and $816,345, respectively, which is included in "support" on the statement of activities. The Foundation also reimburses Goodwill for certain fundraising expenses and pays Goodwill a management fee. This reimbursement and management fee totaled $537,346 and $557,927 for 2014 and 2013, respectively. Included in other receivables at January 03, 2015 and December 28, 2013 is $252,300 and $608,336, respectively, due from the Foundation for grants receivable from the Foundation, reimbursement of fundraising expenses incurred by Goodwill and expenses of the Foundation paid by Goodwill.

GEI leases an Excel Center facility owned by an entity controlled by a GICI board member. The lease for the facility has a 10-year term with a provision that allows early termination if the Excel Center's charter is not renewed when it expires in 2017, and has a rent rate comparable to similar facilities in the same geographic area. The lease became effective January 1, 2012. The board member recused himself from all board of directors' discussion and voting related to the lease transaction.

In 2013, Goodwill purchased land from a third party company on which it built a new retail store. A Goodwill board member is an officer of the third party company. The board member recused himself from all Goodwill board of directors' discussion and voting related to the lease transaction.

In February 2014, Goodwill issued tax-exempt bonds through the Indiana Finance Authority (IFA). A Goodwill board member also serves on the board of the IFA. The board member recused himself from all Goodwill and IFA board of directors' discussion and voting related to the bond transaction.

## 11. Future Grant Audits

Under the terms of federal grants awarded to Goodwill, periodic audits are required and certain costs may be challenged as to allowability under the terms of the grants. Such audits could lead to reimbursement to the grantor. Management believes the likelihood that material costs incurred by Goodwill will be disallowed is remote.

## 12. SELF INSURANCE

Goodwill self insures for employee and dependent medical benefits up to a per-individual annual maximum of $100,000, and an aggregate maximum of approximately $5.8 million. Goodwill purchases reinsurance which pays individual claims that exceed $100,000 per year, in accordance with the provisions of the Affordable Care Act. The reinsurer reviews claims annually and upon renewal of the reinsurance policy each year may establish higher specific maximums on selected individuals with high claims risks. Goodwill purchases claims administration services from a third party administrator. Self insured medical expenses and related administrative costs were $6,139,769 and $6,299,953 for 2014 and 2013, respectively.

Goodwill maintains an estimated liability for incurred but not reported medical claims based on average claim costs and claims processing lag times. At January 3, 2015 and December 28, 2013, the estimated liability was $1,108,870 and $801,751, respectively, and is included in accrued liabilities in the statement of financial position.

## 13. FAIR VALUE MEASUREMENTS

Accounting Standards for Fair Value Measurement define fair value as the price that would be received for an asset or paid to transfer a liability (exit price) in an orderly transaction between market participants at the measurement date. Those standards also establish a three-level fair value hierarchy for disclosure that prioritizes valuations based on whether the significant inputs used to estimate fair value are observable, giving highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1 measurements) and lowest priority to valuations primarily based on unobservable inputs (level 3 measurements). Level 1 inputs are quoted prices (unadjusted) in active markets for identical assets or liabilities that the reporting entity has the ability to access at the measurement date. Level 2 inputs are inputs other than quoted prices included within Level 1 that are observable for the asset or liability, either directly or indirectly. Level 3 inputs are unobservable inputs for the asset or liability. Fair values measured on a recurring basis at January 3, 2015 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 4,406,561 | $ 4,406,561 | $ - | $ - |
| Interest rate swap | $ (289,714) | $ - | $ (289,714) | $ - |

## 13. FAIR VALUE MEASUREMENTS, CONTINUED

Fair values measured on a recurring basis at December 28, 2013 are as follows:

| | Fair Value | Quoted Prices in Active Markets for Identical Assets (Level 1) | Significant Other Observable Inputs (Level 2) | Significant Unobservable Inputs (Level 3) |
|---|---|---|---|---|
| Fixed income mutual fund | $ 5,055,024 | $ 5,055,024 | $ - | $ - |
| Interest rate swap | $ (430,821) | $ - | $ (430,821) | $ - |

Fair values for investments are determined by reference to readily available quoted market prices and other relevant information generated by market transactions. Fair value for the interest rate swap is determined by the prevailing one-month LIBOR rate at the valuation date.

## 14. SUBSEQUENT EVENTS

In 2014, Goodwill entered into an agreement to purchase real estate adjacent to its Indianapolis headquarters for $1.1 million. If the acquisition is successful, Goodwill intends to hold the property for future development. Goodwill has commenced appropriate due diligence efforts related to the property.

In 2014, Goodwill acquired real estate on which it intends to build a retail store. The purchase price was $800,000 and store construction costs will approximate $1.9 million. Goodwill expects to complete construction and open the store in late summer 2015.

On February 12, 2015, Goodwill purchased land for $1.2 million to build a retail store. Store construction costs will approximate $1.9 million, and Goodwill expects the store to open in late summer 2015.

In 2014, Goodwill entered into a 15-year lease with a developer for a build-to-suit outlet store and distribution center facility. The lease agreement requires the developer to obtain all required development entitlements and construction permits and satisfy certain contingencies. As of March 5, 2015, those entitlements, permits and contingencies have not been satisfied. Therefore, the future minimum lease commitments for this project are not included in Note 8.

## GOODWILL INDUSTRIES OF CENTRAL INDIANA, INC. AND SUBSIDIARIES

SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

FOR THE YEAR ENDED JANUARY 03, 2015

| FEDERAL GRANTOR/PASS-THROUGH GRANTOR/PROGRAM TITLE | Federal CFDA Number | Agency or Pass-Through Number | Federal Expenditures |
|---|---|---|---|
| **U.S. DEPARTMENT OF LABOR** | | | |
| Indianapolis Private Industry Council | | | |
| *Jobs for America's Graduates (JAG) Program* | 17.259 | S0704-WI-12-Y | $ 485,710 |
| Goodwill Industries International | | | |
| *Senior Community Service Employment Program* | 17.235 | SCSEP-PY 13/14 Subgrant | 1,984,705 |
| **U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES** | | | |
| Indiana Department of Health | | | |
| *Affordable Care Act - Maternal, Infant and Early Childhood Home Visiting Program* | 93.505 | A70-4-069741 | 714,668 |
| | | A70-4-069740 | 3,057,202 |
| | | | 3,771,870 |
| Total expenditures of federal awards | | | $ 6,242,285 |

## NOTE TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

### 1. BASIS OF PRESENTATION

The accompanying schedule of expenditures of federal awards includes federal grant activity of Goodwill Industries of Central Indiana, Inc. and subsidiaries and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations.* Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in preparation of, the basic consolidated financial statements.

See independent auditors' report.

PH 317 241 2999
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Greenwalt CPAs, Inc.
5342 W. Vermont Street
Indianapolis, IN 46224
www.greenwaltcpas.com

GREENWALT CPAs

## Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*

### Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States of America, the consolidated financial statements of Goodwill Industries of Central Indiana, Inc. and subsidiaries (Goodwill), which comprise the consolidated statement of financial position as of January 03, 2015 and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to consolidated financial statements and have issued our report thereon dated February 26, 2015.

### Internal Control Over Financial Reporting

In planning and performing our audit of the consolidated financial statements, we considered Goodwill's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of Goodwill's internal control. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## Compliance and Other Matters

As part of obtaining reasonable assurance about whether Goodwill's consolidated financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards.*

## Purpose of this Report

This purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Goodwill's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Goodwill's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Greenwalt CPAs, Inc.

March 5, 2015

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GREENWALT CPAs

# Report on Compliance For Each Major Federal Program And Report on Internal Control Over Compliance

## Independent Auditors' Report

To the Board of Directors of
Goodwill Industries of Central Indiana, Inc. and subsidiaries:

### Report on Compliance for Each Major Federal Program

We have audited Goodwill Industries of Central Indiana, Inc. and subsidiaries' (Goodwill) compliance with the types of compliance requirements described in the *OMB Circular A-133 Compliance Supplement* that could have a direct and material effect on each of Goodwill's major federal programs for the year ended January 03, 2015. Goodwill's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

Goodwill's basic financial statements include the operations of Goodwill Education Initiatives, Inc. (GEI) which received $2,703,310 in federal awards which is not included in the schedule of expenditures of federal awards during the year ended January 03, 2015. Our audit, described below, did not include the operations of GEI because the entity's June 30 financial statements are audited at the Charter School Organizer level in accordance with *Government Auditing Standards* and *OMB Circular A-133*.

### Management's Responsibility

Management is responsible for compliance with the requirements of laws, regulations, contracts, and grants applicable to its federal programs.

### Auditors' Responsibility

Our responsibility is to express an opinion on compliance for Goodwill's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America; and *OMB Circular A-133*, *Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and *OMB Circular A-133* require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Goodwill's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of Goodwill's compliance.

## Opinion on Each Major Federal Program

In our opinion, Goodwill complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended January 03, 2015.

## Report on Internal Control Over Compliance

Management of Goodwill is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Goodwill's internal control over compliance with the types of compliance requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with *OMB Circular A-133*, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Goodwill's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of *OMB Circular A-133*. Accordingly, this report is not suitable for any other purpose.

Greenwalt CPAs, Inc.

March 5, 2015

## A. SUMMARY OF AUDIT RESULTS

1. Type of auditors' report issued: Unmodified

2. Internal control over financial reporting:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

3. Noncompliance material to financial statements noted? _____yes ___x___no

4. Internal control over major programs compliance:
   Material weakness(es) identified? _____yes ___x___no
   Significant deficiency(ies) identified? _____yes ___x___none reported

5. Type of auditors' report issued on compliance for major programs: Unmodified

6. Any audit findings disclosed that are required to be reported in accordance with Section 510(a) of OMB Circular A-133? _____yes ___x___no

7. Identification of major programs:

| CFDA Number | Name of Federal Program or Cluster |
|---|---|
| 17.235 | Senior Community Service Employment Progra |

8. Dollar threshold used to distinguish between type A and type B programs: $ 300,000

9. Auditee qualified as low-risk auditee? ___x___yes _____no

## B. FINDINGS - FINANCIAL STATEMENT AUDIT

None

## C. FINDINGS AND QUESTIONED COSTS - MAJOR FEDERAL AWARD PROGRAM AUDIT

None

See independent auditors' report on compliance for each major federal program and on internal control over compliance

# Goodwill Education Initiatives Inc
# Balance Sheet

| | Actual 02/28/2017 | Actual 06/30/2016 |
|---|---|---|
| ASSETS | | |
| Current Assets | | |
| Cash | $8,143,737.86 | $8,380,791.81 |
| Accounts Receivable | $607,075.57 | $568,528.39 |
| Investments | $2,000,000.00 | $0.00 |
| Other Current Assetss | $197,485.21 | $236,564.70 |
| Intercompany Transfers | $760,246.27 | $880,246.27 |
| Inventory | $2,441.20 | $2,376.45 |
| Total Current Assets | $11,710,986.11 | $10,068,507.62 |
| Long-Term Assets | | |
| Fixed Assets, net | $2,245,553.41 | $2,710,135.57 |
| Total Long-Term Assets | $2,245,553.41 | $2,710,135.57 |
| Total ASSETS | $13,956,539.52 | $12,778,643.19 |
| LIABILITIES & NET ASSETS | | |
| LIABILITIES | | |
| Current Liabilities | | |
| Accounts Payable | $407,122.36 | $783,362.06 |
| Intercompany Transfers | $760,246.27 | $880,246.27 |
| Other Liabilities | $734,252.39 | $495,488.11 |
| Unearned Revenue | $206,751.95 | $0.00 |
| Total Current Liabilities | $2,108,372.97 | $2,159,096.44 |
| Short-Term Debt | | |
| Loan from INI Schools | $0.00 | $0.00 |
| Current Portion of Long-Term Debt | $0.00 | $153,565.45 |
| Total Short Term-Debt | $0.00 | $153,565.45 |
| Long-Term Debt | | |
| Note Payable - Landlord | $0.00 | $156,744.75 |
| Total Long-Term Debt | $0.00 | $156,744.75 |
| Total LIABILITIES | $2,108,372.97 | $2,469,406.64 |
| NET ASSETS | | |
| Unrestricted Net Assets | $11,570,943.78 | $10,032,013.78 |
| Temporarily Restricted Net Assets | $277,222.77 | $277,222.77 |
| Total NET ASSETS | $11,848,166.55 | $10,309,236.55 |
| Total LIABILITIES & NET ASSETS | $13,956,539.52 | $12,778,643.19 |

# Goodwill Education Initiatives Inc
## Income Statement

| | YTD Actual 07/01/2016-02/28/2017 | YTD Budget 07/01/2016-02/28/2017 | Favorable / (Unfavorable) | % Variance | Prior YTD Actual 07/01/2015 - 02/2 |
|---|---|---|---|---|---|
| REVENUE | | | | | |
| Goodwill Funding | $555,436.49 | $628,200.00 | ($72,763.51) | 88.42 % | $541,489.06 |
| Private Funding | $525.00 | $0.00 | $525.00 | 0.00 % | $552,006.81 |
| State Funding | $15,814,588.52 | $16,099,900.00 | ($285,311.48) | 98.23 % | $15,872,333.57 |
| Transfers - Member Schools | $0.00 | $0.00 | $0.00 | 0.00 % | $0.00 |
| Federal Funding | $891,044.98 | $1,309,100.16 | ($418,055.18) | 68.07 % | $1,769,319.90 |
| Service Fee Income - GEI | $2,126,666.40 | $2,126,664.00 | $2.40 | 100.00 % | $2,183,333.04 |
| Service Fee Income - Other | $899,144.82 | $1,064,799.96 | ($165,655.14) | 84.44 % | $939,630.27 |
| Licensing Fee - GEI | $289,498.00 | $286,800.00 | $2,698.00 | 100.94 % | $294,954.60 |
| Other Income | $19,756.32 | $10,436.37 | $9,319.95 | 189.30 % | $125,659.83 |
| TOTAL REVENUE | $20,596,660.53 | $21,525,900.49 | ($929,239.96) | 95.68 % | $22,278,727.08 |
| | | | | | |
| EXPENSES | | | | | |
| Wages/Benefits | | | | | |
| Salary and Wage | $8,058,515.56 | $8,876,866.40 | $818,350.84 | 90.78 % | $8,772,002.94 |
| Payroll Taxes | $589,067.66 | $669,799.92 | $80,732.26 | 87.95 % | $641,334.04 |
| Group Insurance | $1,349,406.74 | $1,599,533.36 | $250,126.62 | 84.36 % | $1,546,009.97 |
| Retirement | $485,740.41 | $630,266.68 | $144,526.27 | 77.07 % | $535,194.51 |
| Other Benefits | $77,999.58 | $107,666.64 | $29,667.06 | 72.45 % | $78,421.52 |
| Total Wages/Benefits | $10,560,729.95 | $11,884,133.00 | $1,323,403.05 | 88.86 % | $11,572,962.98 |
| | | | | | |
| Professional Fees | $3,938,547.04 | $4,287,392.40 | $348,845.36 | 91.86 % | $3,791,556.80 |
| Licensing Fees | $289,498.00 | $286,866.72 | ($2,631.28) | 100.92 % | $294,954.60 |
| Supplies and Materials | $372,689.95 | $492,587.36 | $119,897.41 | 75.66 % | $505,618.56 |
| Lunch Program | $72,428.67 | $66,500.00 | ($5,928.67) | 108.92 % | $63,998.15 |
| Student Transportation | $162,216.39 | $253,400.08 | $91,183.69 | 64.02 % | $209,803.76 |
| Drop-In Center | $11,112.86 | $17,133.28 | $6,020.42 | 64.86 % | $17,266.88 |
| Extra-Curricular Activities | $58,205.09 | $28,181.85 | ($30,023.24) | 206.53 % | $23,796.73 |
| Rent | $1,647,717.22 | $1,684,786.68 | $37,069.46 | 97.80 % | $1,577,057.26 |
| Occupancy | $693,998.92 | $714,870.48 | $20,871.56 | 97.08 % | $692,442.09 |
| Scholarships | $17,180.00 | $75,000.00 | $57,820.00 | 22.91 % | $68,675.05 |

| | YTD Actual 07/01/2016-02/28/2017 | YTD Budget 07/01/2016-02/28/2017 | Favorable / (Unfavorable) | % Variance | Prior YTD Actual 07/01/2015 - 02/2 |
|---|---|---|---|---|---|
| Interest Expense | $6,227.55 | $10,266.64 | $4,039.09 | 60.66 % | $14,147.16 |
| Depreciation | $874,712.94 | $1,200,533.36 | $325,820.42 | 72.86 % | $1,085,201.85 |
| Bad Debt Expense | $12,047.92 | $0.00 | ($12,047.92) | 0.00 % | $45,000.00 |
| Other Expenses | $340,418.03 | $384,330.48 | $43,912.45 | 88.57 % | $301,644.60 |
| TOTAL EXPENSES | $19,057,730.53 | $21,385,982.33 | $2,328,251.80 | 89.11 % | $20,264,126.47 |
| TOTAL NET INCOME | $1,538,930.00 | $139,918.16 | $1,399,011.84 | 1,099.88 % | $2,014,600.61 |
| **BEGINNING NET ASSETS** | **$10,309,236.55** | **$10,309,236.55** | **$0.00** | **100.00 %** | **$8,508,686.61** |
| **NET SURPLUS/(DEFICIT)** | **$1,538,930.00** | **$139,918.16** | **$1,399,011.84** | **1,099.88 %** | **$2,014,600.61** |
| **ENDING NET ASSETS** | **$11,848,166.55** | **$10,449,154.71** | **$1,399,011.84** | **113.39 %** | **$10,523,287.22** |

## Schools managed by Goodwill Education Initiatives, Inc.

| School | Performance Indicators | 2015-2016 | 2014-2015 | 2013-2014 | 2012-2013 | 2011-2012 |
|---|---|---|---|---|---|---|
| | | School Year | | | | |
| The Excel Center- Anderson | Pass rate ECA 10 English | 60% | 68% | 57% | * | |
| | Pass rate ECA Algebra I | 100% | 94% | 94% | * | |
| | Number graduates | 44 | 48 | 74 | 71 | |
| | Graduates earned college credit | * | * | * | * | |
| The Excel Center- Decatur | Pass rate ECA 10 English | * | 49% | 57% | * | * |
| *Closed in 2016* | Pass rate ECA Algebra I | 80% | 73% | 55% | * | * |
| | Number graduates | * | * | * | * | * |
| | Graduates earned college credit | * | * | * | * | * |
| The Excel Center- Franklin | Pass rate ECA 10 English | 47% | 79% | 61% | * | |
| | Pass rate ECA Algebra I | 100% | 86% | 96% | * | |
| | Number graduates | * | * | * | * | |
| | Graduates earned college credit | * | * | * | * | |
| The Excel Center- Kokomo | Pass rate ECA 10 English | 60% | 80% | 83% | | |
| | Pass rate ECA Algebra I | 30% | 79% | 84% | | |
| | Number graduates | 46 | 81 | 42 | | |
| | Graduates earned college credit | * | * | * | | |
| The Excel Center- Lafayette | Pass rate ECA 10 English | 79% | 68% | 83% | | |
| | Pass rate ECA Algebra I | 84% | 71% | 81% | | |
| | Number graduates | 56 | 83 | 48 | | |
| | Graduates earned college credit | * | * | * | | |
| The Excel Center- Meadows | Pass rate ECA 10 English | 23% | 63% | 55% | * | * |
| | Pass rate ECA Algebra I | 67% | 80% | 83% | * | * |
| | Number graduates | * | * | * | * | * |
| | Graduates earned college credit | * | * | * | * | * |
| The Excel Center- Michigan Street | Pass rate ECA 10 English | 38% | 68% | 67% | * | * |
| | Pass rate ECA Algebra I | 100% | 99% | 100% | * | * |
| | Number graduates | * | * | * | * | * |
| | Graduates earned college credit | * | * | * | * | * |
| The Excel Center- Noblesville | Pass rate ECA 10 English | 43% | | | | |
| | Pass rate ECA Algebra I | 86% | | | | |
| | Number graduates | 22 | | | | |
| | Graduates earned college credit | * | | | | |
| The Excel Center- Richmond | Pass rate ECA 10 English | 41% | 68% | 56% | | |
| | Pass rate ECA Algebra I | 70% | 73% | 83% | | |
| | Number graduates | 38 | 91 | 35 | | |
| | Graduates earned college credit | * | * | * | | |
| The Excel Center- Shelbyville | Pass rate ECA 10 English | | | | | |
| | Pass rate ECA Algebra I | | | | | |
| | Number graduates | | | | | |
| | Graduates earned college credit | | | | | |
| The Excel Center- University Heights | Pass rate ECA 10 English | 60% | | | | |
| | Pass rate ECA Algebra I | 100% | | | | |
| | Number graduates | 8 | | | | |
| | Graduates earned college credit | * | | | | |
| The Excel Center- West | Pass rate ECA 10 English | 20% | 70% | 62% | | |
| | Pass rate ECA Algebra I | 100% | 96% | 100% | | |
| | Number graduates | 37 | 72 | 73 | | |
| | Graduates earned college credit | * | * | * | | |
| Indianapolis Metropolis High School | Pass rate ECA 10 English | 16% | 30% | 35% | 48% | 33% |
| | Pass rate ECA Algebra I | 46% | 40% | 23% | 24% | 46% |
| | Graduation rate | * | 48% | 52% | 64% | 66% |
| | Graduates enrolled in college | * | * | * | * | * |

* Information not available/ accessible

School opened after these school years

## The Excel Center - Indianapolis

**Year Opened:** *The year each location opened is noted in parentheses, below.*

**Locations:**

*(4 separate locations operate under 1 charter)*

Michigan Street (2010)
1635 W. Michigan St.
Indianapolis, IN 46222

Decatur (2011) - closed 2016
5125 Decatur Blvd., Ste. B
Indianapolis, IN 46241

Meadows (2011)
3919 Meadows Dr.
Indianapolis, IN 46205

Franklin (2012)
2588 N. Franklin Rd.
Indianapolis, IN 46219

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Mayor of Indianapolis
Office of Education Innovation
200 E. Washington St.
Suite 2501
Indianapolis, IN 46204
Phone: (317)327-3618

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

| | |
|---|---|
| **Grade Levels:** | 9-12 |
| **Enrollment:** | 1,268 |
| **Free / Reduced Lunch:** | 83.5% |
| **Race / Ethnicity** | |
| American Indian: | 60.0% |
| Black: | 61.3% |
| Asian: | 3.4% |
| Hispanic: | 14.0% |
| White: | 17.5% |
| Multiracial: | 3.1% |
| Pacific Islander: | 20.0% |
| **Special Education:** | 7.0%* |

## The Excel Center - Indianapolis

**English Language Learner:** 14.5%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| *Accountability Grade*** | F† | F† | F† | A | n/a |

Michigan Street:

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| English 10 ECA | | | 66.7% | 68.4% | 37.5% |
| Algebra I ECA | | | 100.0% | 98.8% | 100.0% |
| Grad Rate*** | 76.0% | 68.0% | 61.0% | 82.3% | 96.3% |
| CCR | 51.0% | 80.0% | 100.0% | 100.0% | 100.0% |

Decatur

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| English 10 ECA | | | 56.7% | 48.9% | n/a |
| Algebra I ECA | | | 54.5% | 73.3% | 80.0% |
| Grad Rate*** | 40.0% | 53.0% | 66.0% | 82.3% | 96.3% |
| CCR | 80.0% | 65.0% | 100.0% | 100.0% | 100.0% |

Meadows

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| English 10 ECA | | | 54.8% | 62.9% | 23.1% |
| Algebra I ECA | | | 82.9% | 79.6% | 66.7% |
| Grad Rate*** | 45.0% | 79.0% | 77.0% | 82.3% | 96.3% |
| CCR | 55.0% | 76.0% | 98.0% | 100.0% | 100.0% |

Franklin

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| English 10 ECA | | | 61.3% | 78.8% | 47.4% |
| Algebra I ECA | | | 96.3% | 85.5% | 100.0% |
| Grad Rate*** | n/a | 32.0% | 66.0% | 82.3% | 96.3% |
| CCR | n/a | 80.0% | 100.0% | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

***Accountability Grades are not an accurate reflection of Excel Center performance due less than 20% of students belonging to an active cohort. The State Board of Education has acknowledged this and has created an alternative accountability model for schools such as the Excel Center.*

†Grade was awarded prior to SBOE's approval of an alternative accountability system for adult dropout recovery

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

College & Career Readiness is the percentage of graduates that have earned at least 3 college credits or earned

## The Excel Center - Indianapolis

an Industry Certification prior to graduation.

## The Excel Center - Anderson

**Year Opened:** 2012
**Location:** 630 Nichol Ave
Anderson, IN 46016

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 356
**Free / Reduced Lunch:** 69.1%
**Race / Ethnicity**
American Indian: 0.3%
Black: 38.2%
Asian: 0.6%
Hispanic: 5.6%
White: 50.6%
Multiracial: 4.8%
**Special Education:** 9.3%*
**English Language Learner:** 3.4%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n'size not met | F† | B | n/a |
| English 10 ECA | | | 57.1% | 68.3% | 60.0% |
| Algebra I ECA | | | 94.1% | 93.9% | 100.0% |
| Grad Rate*** | n/a | 66.0% | 92.0% | 55.6% | 79.9% |
| CCR | n/a | 99.0% | 100.0% | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

## The Excel Center - Anderson

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

[+]Grade was awarded prior to SBOE's approval of an alternative accountability system for adult dropout recovery schools.

## The Excel Center - Kokomo

**Year Opened:** 2013
**Location:** 101 W. Superior St.
Kokomo, IN 46901

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 353
**Free / Reduced Lunch:** 64.5%
**Race / Ethnicity**
Black: 12.2%
Hispanic: 5.4%
White: 76.5%
Multiracial: 5.7%
Asian 0.3%
**Special Education:** 9.3%*
**English Language Learner:** 1.1%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | A | n/a |
| English 10 ECA | n/a | n/a | 83.3% | 79.7% | 60.0% |
| Algebra I ECA | n/a | n/a | 84.0% | 78.6% | 30.4% |
| Grad Rate*** | n/a | n/a | n'size not met | 98.5% | 95.8% |
| CCR | n/a | n/a | n'size not met | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Excel Center - Lafayette

**Year Opened:** 2013
**Location:** 615 N. 18th St.
Lafayette, IN 47904

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 295
**Free / Reduced Lunch:** 68.0%
**Race / Ethnicity**
American Indian: 0.3%
Black: 15.3%
Asian: 1.0%
Hispanic: 15.3%
White: 64.1%
Multiracial: 3.7%
Pacific Islander 0.3%
**Special Education:** 9.2%*
**English Language Learner:** 11.5%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | A | n/a |
| English 10 ECA | n/a | n/a | 83.3% | 68.0% | 78.9% |
| Algebra I ECA | n/a | n/a | 80.9% | 70.8% | 84.2% |
| Grad Rate*** | n/a | n/a | n'size not met | 100.0% | 100.0% |
| CCR | n/a | n/a | n'size not met | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

## The Excel Center - Lafayette

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Excel Center - Noblesville

**Year Opened:** 2015

**Locations:** 300 N. 17th St.
Noblesville, IN 46060

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 137
**Free / Reduced Lunch:** 65.7%
**Race / Ethnicity**
American Indian: 0.7%
Black: 11.7%
Asian: 0.7%
Hispanic: 21.2%
White: 62.0%
Multiracial: 2.9%
Pacific Islander 0.7%
**Special Education:** 12.4%*
**English Language Learner:** 16.1%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | n/a | n/a |
| English 10 ECA | n/a | n/a | n/a | n/a | 42.9% |
| Algebra I ECA | n/a | n/a | n/a | n/a | 85.7% |
| Grad Rate*** | n/a | n/a | n/a | n/a | 64.6% |
| CCR | n/a | n/a | n/a | n/a | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

## The Excel Center - Noblesville

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Excel Center - Richmond

**Year Opened:** 2013
**Location:** 1215 S. J St.
Richmond, IN 47374

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 295
**Free / Reduced Lunch:** 71.5%
**Race / Ethnicity**
American Indian: 0.7%
Black: 12.2%
Hispanic: 2.4%
White: 81.4%
Multiracial: 3.4%
**Special Education:** 13.6%*
**English Language Learner:** 1.7%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | A | n/a |
| English 10 ECA | n/a | n/a | 55.6% | 67.8% | 41.2% |
| Algebra I ECA | n/a | n/a | 82.8% | 73.0% | 70.0% |
| Grad Rate*** | n/a | n/a | n'size not met | 100.0% | 99.1% |
| CCR | n/a | n/a | n'size not met | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Excel Center - Shelbyville

**Year Opened:** 2016

**Location:** 111 N. Harrison St.
Shelbyville, IN 46176

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Indiana Charter School Board
143 W. Market St.
Suite 300
Indianapolis, IN 46204
Phone: (317) 232-0694

**Grade Levels:** 9-12
**Enrollment:** n/a
**Free / Reduced Lunch:** n/a
**Race / Ethnicity**
American Indian: n/a
Black: n/a
Asian: n/a
Hispanic: n/a
White: n/a
Multiracial: n/a
**Special Education:** n/a
**English Language Learner:** n/a

**Student Performance Result** **The Excel Center - Shelbyville was not open for any of the years below**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | n/a | n/a |
| English 10 ECA | n/a | n/a | n/a | n/a | n/a |
| Algebra I ECA | n/a | n/a | n/a | n/a | n/a |
| Grad Rate | n/a | n/a | n/a | n/a | n/a |
| CCR | n/a | n/a | n/a | n/a | n/a |

## The Excel Center - University Heights

**Year Opened:** 2015
**Location:** 3919 Madison Ave
Indianapolis, IN 46227

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Mayor of Indianapolis
Office of Education Innovation
200 E. Washington St.
Suite 2501
Indianapolis, IN 46204
Phone: (317)327-3618

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 306
**Free / Reduced Lunch:** 74.8%
**Race / Ethnicity**
American Indian: 0.3%
Black: 22.5%
Asian: 16.0%
Hispanic: 10.5%
White: 45.1%
Multiracial: 4.2%
Pacific Islander: 1.3%
**Special Education:** 4.9%*
**English Language Learner:** 19.9%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | n/a | n/a |
| English 10 ECA | n/a | n/a | n/a | n/a | 60.0% |
| Algebra I ECA | n/a | n/a | n/a | n/a | 100.0% |
| Grad Rate*** | n/a | n/a | n/a | n/a | 41.2% |
| CCR | n/a | n/a | n/a | n/a | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

## The Excel Center - University Heights

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Excel Center - West

**Year Opened:** 2013

**Locations:** 6000 W. 34th Street
Indianapolis, IN 46224

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Mayor of Indianapolis
Office of Education Innovation
200 E. Washington St.
Suite 2501
Indianapolis, IN 46204
Phone: (317)327-3618

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 348
**Free / Reduced Lunch:** 77.9%
**Race / Ethnicity**
American Indian: 0.3%
Black: 33.0%
Asian: 3.4%
Hispanic: 51.7%
White: 8.0%
Multiracial: 2.0%
Pacific Islander: 1.4%
**Special Education:** 0.6%*
**English Language Learner:** 56.9%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | n/a | n/a | n/a | B | n/a |
| English 10 ECA | n/a | n/a | 61.9% | 69.7% | 20.0% |
| Algebra I ECA | n/a | n/a | 100.0% | 95.9% | 100.0% |
| Grad Rate*** | n/a | n/a | n'size not met | 71.5% | 73.7% |
| CCR | n/a | n/a | n'size not met | 100.0% | 100.0% |

*The official special education number only includes students who have not aged out of IDEA at age 22. Unofficial estimates place this number closer to 30%.

## The Excel Center - West

***Grad Rate is calculated as the SBOE-approved graduation rate for dropout recovery high schools.

## The Indianapolis Metropolitan High School

**Year Opened:** 2004
**Location:** 1635 W. Michigan St.
Indianapolis, IN 46222

**Contact Information:** Betsy Delgado, Superintendent
1635 W. Michigan St.
Indianapolis, IN 46222
Phone: (317) 524-4380

**Authorizer Contact:** Mayor of Indianapolis
Office of Education Innovation
200 E. Washington St.
Suite, 2501
Indianapolis, IN 46201
Phone: (317)327-3618

*Note: The following enrollment and demographic data are based on the State of Indiana's Pupil Enrollment count, September 2015*

**Grade Levels:** 9-12
**Enrollment:** 256
**Free / Reduced Lunch:** 87.1%
**Race / Ethnicity**
American Indian: 0.0%
Black: 77.0%
Asian: 0.0%
Hispanic: 6.6%
White: 12.1%
Multiracial: 4.3%
**Special Education:** 19.9%
**English Language Learner:** 3.9%

**Student Performance Results:**

| | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 |
|---|---|---|---|---|---|
| Accountability Grade | D | C | D | D | n/a |
| English 10 ECA | 32.6% | 48.3% | 35.0% | 30.2% | 15.7% |
| Algebra I ECA | 45.9% | 23.8% | 23.2% | 40.0% | 45.7% |
| Grad Rate | 66.4% | 64.0% | 52.2% | 47.7% | n/a |

**Attachment 22 – Litigation Documentation**

Not applicable. There is no current or past litigation, including arbitration proceedings, that has involved GEI or The Excel Centers.

| CSP Grant Application Element 2b) | | | |
|---|---|---|---|
| **Charter** | | **2015-2016** | **2016-2017** |
| | | | |
| **Noblesville** | School Grade | A | A |
| | Graduation Calculation Score | 60.74 | 94.97 |
| | CCR Score | 100 | 100 |
| | | | |
| **Richmond** | School Grade | A | A |
| | Graduation Calculation Score | 92.47 | 94.16 |
| | CCR Score | 100 | 100 |
| | | | |
| **Shelbyville** | School Grade | School not open during this year | A |
| | Graduation Calculation Score | | 72.47 |
| | CCR Score | | 100 |
| | | | |
| **University Heights** | School Grade | B | B |
| | Graduation Calculation Score | 38.04 | 71.2 |
| | CCR Score | 100 | 100 |
| | | | |
| **Kokomo** | School Grade | A | A |
| | Graduation Calculation Score | 90.2 | 83.95 |
| | CCR Score | 100 | 100 |
| | | | |
| **Anderson** | School Grade | A | B |
| | Graduation Calculation Score | 74.98 | 60.97 |
| | CCR Score | 100 | 100 |
| | | | |
| **5669 (Michigan Street, Meadows, and Franklin)** | School Grade | A | A |
| | Graduation Calculation Score | 91.05 | 87.87 |
| | CCR Score | 100 | 100 |
| | | | |
| **Lafayette Square (West)** | School Grade | B | A |
| | Graduation Calculation Score | 70.64 | 78.93 |
| | CCR Score | 100 | 100 |
| | | | |
| **Lafayette** | School Grade | A | A |
| | Graduation Calculation Score | 93.37 | 94.62 |
| | CCR Score | 100 | 100 |

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

5748 Excel Center Noblesville

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 45 |
| 2016 4 Year Graduation Rate: | 25 |
| 2016 Graduation Rate Improvement: | 20 |
| 2017 4 Year Graduation Rate: | 29.67 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **49.67** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 60 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 195 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 186 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 190.5 |
| Graduation to Enrollment Percentage: | 31.50 |
| Multiply the Graduation to Enrollment Percentage by 4: | 126.00 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **100.00** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 100.00 | 0.9 | 90.00 |
| Graduation Rate: | 49.67 | 0.1 | 4.97 |
| | | | 94.97 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 96.7% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **94.97** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 95.00 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 94.97 | 0.4 | 38.0 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **98.0** |
| | | **Overall Grade:** | **A** |

5748 Excel Center Noblesville

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 272504050 | Adkins, Kaitlyn Nichelle | N | N | N | Y | N | Y |
| 250203160 | Bragg, Alyssa Marie | N | N | N | Y | N | Y |
| 506405041 | Brawner, Lauren Lee | N | Y | N | N | Y | Y |
| 249507080 | Cannon, Alexis Pearl | N | N | N | Y | N | Y |
| 252903026 | Chastain, Kiera Marni | N | N | N | Y | N | Y |
| 527302741 | Chiquito Presa, Diego Armando | N | N | N | Y | N | Y |
| 070903500 | Cortes, Jorge Andreas | N | N | N | Y | N | Y |
| 512305655 | Cortes, Guadalupe | N | N | N | Y | Y | Y |
| 254705026 | Cox, Jillian Garrett | N | N | N | Y | N | Y |
| 516106025 | Craft, Hannah Alexis | N | N | N | Y | N | Y |
| 530103618 | Denney, Samantha Nichole | N | N | N | N | Y | Y |
| 518307004 | Dwiggens, Kodi Williams | N | N | N | Y | Y | Y |
| 249503097 | Eaglehawk, Tala Lynn | N | N | N | Y | N | Y |
| 246805334 | Eddingfield, Lakoda Ann | N | N | N | Y | N | Y |
| 254102521 | Ediza, Jarod Michael | N | N | N | N | Y | Y |
| 252909102 | Elks, Tristyn Shea | N | N | N | Y | N | Y |
| 252909101 | Elks, Taylor Diane | N | N | N | Y | N | Y |
| 254104088 | Emery, Taylor Wilson | N | N | N | Y | N | Y |
| 494507025 | Exiga, Yesenia | N | N | N | N | Y | Y |
| 251714134 | Fowler, Antwain Delashawn | N | N | N | Y | N | Y |
| 250310019 | Fox, Kevin David | N | N | N | Y | N | Y |
| 289504064 | Freeman, Jaden Olen | N | N | N | Y | Y | Y |
| 247004445 | Gavin, Maxwell John | N | N | N | Y | N | Y |
| 247105535 | Gunderson, Reid Vernon | N | N | N | Y | N | Y |
| 249302839 | Hawkins, Jenniefer | N | N | N | Y | N | Y |
| 412502053 | Heath, Chardonay Chanell | N | N | N | Y | N | Y |
| 056503058 | Hoffman, Darian Rae | N | N | N | Y | Y | Y |
| 251714129 | Howerton, Zachary Richard | N | N | N | Y | N | Y |
| 252902604 | Johnson, Christina N | N | N | N | Y | N | Y |
| 254207058 | Jones, Conor William-Michael | N | N | N | Y | Y | Y |
| 246807560 | Kaur, Simranjeet | N | N | N | Y | N | Y |
| 254704092 | Kerns, Michael | N | N | N | N | Y | Y |
| 247102094 | Kulp, Kevin James | N | N | N | Y | N | Y |
| 170503030 | Lehman, Donovan Gabriel | N | N | N | Y | Y | Y |
| 566914587 | Martinez, Angel R | N | N | N | N | Y | Y |
| 574816007 | Mcdonald, Joyce E | Y | N | N | N | Y | Y |
| 246801733 | Mendez, Kevin Jesus | N | N | N | Y | N | Y |

5748 Excel Center Noblesville

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 253303057 | Merrell, David James | N | N | N | Y | N | Y |
| 252304069 | Middaugh, Mitchell Curtis | N | N | N | Y | N | Y |
| 254202642 | Montgomery, Joelenea L | N | N | N | Y | Y | Y |
| 543476905 | Morse, Stephanie Lynn | N | N | N | Y | Y | Y |
| 248106522 | Paidoussis, Nicole Helen | N | N | N | N | Y | Y |
| 248104260 | Petry, Julia Krise | N | N | N | N | Y | Y |
| 246603079 | Piper, Casey Taylor | N | N | N | Y | N | Y |
| 254702869 | Reese, Emily | N | N | N | Y | N | Y |
| 574916125 | Rodriguez-Guzman, Maria De San Juan | Y | N | N | Y | N | Y |
| 574816116 | Rosales, Albert Antonio | N | N | N | N | N | N |
| 820906083 | Rose, Rebbecca Starlyn | N | N | N | Y | N | Y |
| 250203132 | Sharkey, William Caleb | N | N | N | Y | N | Y |
| 566916250 | Shen, Fei | N | N | N | Y | Y | Y |
| 253302813 | Smith, Pamela Danae | N | N | N | N | N | N |
| 249302493 | Smith, Brandy N | N | N | N | N | Y | Y |
| 247000964 | Spangler, Justin Lee | N | N | N | N | N | N |
| 250311015 | Velis, Ariel Lynn-Marie | N | Y | N | Y | Y | Y |
| 247806008 | Waddell, Tiffany Denise | N | N | N | Y | N | Y |
| 857504055 | Warren, Kyla Erin Marie | N | N | N | Y | Y | Y |
| 252902502 | Wentworth, Zachary Wayne | N | N | N | Y | N | Y |
| 511303134 | White, Paulina Rena | N | N | N | N | Y | Y |
| 254103081 | Williams, Jasmine Raine | N | N | N | Y | N | Y |
| 252902505 | Withrow, Shelby Faye | N | N | N | Y | N | Y |

Total Number of Graduates: 60 Number of Waivers: 2 Number of CCR: 57

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

9012 Excel Center Richmond

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 28.5 |
| 2016 4 Year Graduation Rate: | 21.1 |
| 2016 Graduation Rate Improvement: | 7.4 |
| 2017 4 Year Graduation Rate: | 34.18 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **41.58** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 67 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 267 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 236 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 251.5 |
| Graduation to Enrollment Percentage: | 26.64 |
| Multiply the Graduation to Enrollment Percentage by 4: | 106.56 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **100.00** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 100.00 | 0.9 | 90.00 |
| Graduation Rate: | 41.58 | 0.1 | 4.16 |
| | | | 94.16 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 91.0% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **94.16** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 88.06 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 94.16 | 0.4 | 37.7 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **97.7** |
| | | **Overall Grade:** | **A** |

9012 Excel Center Richmond

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 903704038 | Anders, Rachel Nicole | N | N | N | Y | N | Y |
| 901214683 | Avila Ramirez, Jorge | N | N | N | N | Y | Y |
| 898302028 | Aynes, Sammantha Michelle | N | N | N | Y | N | Y |
| 897102002 | Bane, Shay | N | N | N | N | Y | Y |
| 903705020 | Blevins, Hayleigh Lynn | N | N | N | N | N | N |
| 283204061 | Blevins, Dylan Wiley | N | N | N | N | N | N |
| 283202043 | Blevins, Tyler W | N | N | N | N | N | N |
| 712911003 | Bradley, Abbie Danielle | N | N | N | N | Y | Y |
| 780305054 | Brooks, Elizabeth Paige | N | N | N | N | Y | Y |
| 901705075 | Carico, Kalie Nicole | N | N | N | Y | N | Y |
| 898404305 | Cohee, Jared Michael | N | N | N | Y | N | Y |
| 119709124 | Collins, Trent Harlan | N | N | N | Y | Y | Y |
| 901214128 | Dingle, Debra L | Y | N | N | Y | N | Y |
| 898405013 | Eales, Stuart Langston | N | N | N | Y | Y | Y |
| 901304093 | Eggers, Zachary | N | N | N | Y | Y | Y |
| 898305101 | Forbes, Rosemary Christine | N | N | N | N | Y | Y |
| 905301031 | Ford, Chazlyn G | N | N | N | Y | N | Y |
| 900502247 | Foster, Kimberly | N | N | N | Y | N | Y |
| 903705004 | Graham, Adell Kenya | N | N | N | Y | N | Y |
| 898904132 | Henderson, Diamond Alexius | N | N | N | Y | N | Y |
| 898405018 | Heppeard, Kylee Cheyenne | N | N | N | Y | N | Y |
| 250102201 | Hutchens, Shanalin Rose | N | N | N | N | Y | Y |
| 901406028 | Jackson, Tylyn Rene | N | N | N | Y | Y | Y |
| B03502196 | Keen, Elizabeth Mackenzie | N | N | N | N | Y | Y |
| 820902039 | Kelly, Jamie Nicole | N | N | N | Y | Y | Y |
| 901214713 | Lankford, Mikaela Mae | N | N | N | N | Y | Y |
| 901214506 | Lee, Mark E | N | N | N | N | Y | Y |
| 899313031 | Maish, Lane Austin | N | N | N | Y | Y | Y |
| 904505018 | May, Isaac T Colton | N | N | N | N | Y | Y |
| 901214560 | Mayberry, Ealnor L | Y | N | N | N | Y | Y |
| 903705007 | Mcdaniel, Kierstin Bryn | N | N | N | Y | Y | Y |
| 901214788 | Miller, Bert D | N | N | N | Y | N | Y |
| 904502313 | Miller, Donovan Edward Allen | N | N | N | Y | Y | Y |
| 898906044 | Moffitt, Kaitlyn Marie | N | N | N | Y | N | Y |
| 308104056 | Morrow, Alexus Lakeysha Sue | N | N | N | Y | N | Y |
| 901402230 | Murphy, Jeffrey K | N | N | N | Y | Y | Y |
| 711305024 | Noelker, Mary E B | N | N | N | N | N | N |

9012 Excel Center Richmond

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 905301068 | Norris, Tori Marie | N | N | N | Y | N | Y |
| 901214626 | Odom, Vincent L | N | N | N | N | Y | Y |
| 283204030 | Orr, Kirsten Nicole | N | N | N | N | Y | Y |
| 900502012 | Partin, Michelle Renee | N | N | N | Y | N | Y |
| 820904059 | Patterson, Rachel Skylar | N | N | N | Y | Y | Y |
| 901704015 | Perkins, Lexus Keyonia | N | N | N | N | N | N |
| 820904066 | Pollock, Preston Michael | N | N | N | Y | N | Y |
| 901214578 | Prebenda, Katherine L | N | N | N | Y | Y | Y |
| 899712113 | Quijada, Jahaziel Javier | N | N | N | Y | N | Y |
| 901214797 | Quinn, April E | N | N | N | Y | N | Y |
| 901214459 | Rainer, Nikki Lynn | N | N | N | Y | N | Y |
| 901214711 | Rainer, Lisa Ann | N | N | N | Y | N | Y |
| 820904068 | Redd, Ashley Lynn R | N | N | N | Y | N | Y |
| 901705037 | Reid, Mackinsey Haylie | N | N | N | Y | N | Y |
| 905303073 | Richard, Dylan Le | N | N | N | Y | Y | Y |
| 898903065 | Roberts, Logan Roszell | N | N | N | N | N | N |
| 900502322 | Robinson, Chandler | N | N | N | N | Y | Y |
| 894303066 | Rodriguez-Rivera, Jonathan | N | N | N | Y | Y | Y |
| 894306011 | Rogan, Brooklyn Christine | N | N | N | Y | N | Y |
| 900303053 | Shelton, Dylan | N | N | N | Y | Y | Y |
| 148206050 | Shields, Cassandra Brooke | N | N | N | N | Y | Y |
| B29005038 | Silvia, Shawn Michael | N | N | N | N | Y | Y |
| 901304049 | Sittloh, Hannah Nicole | N | N | N | N | Y | Y |
| 898402365 | Spigle, Amanda Lyn | N | N | N | Y | Y | Y |
| 901214405 | Weatherspoon, Tammy | Y | N | N | Y | Y | Y |
| 901214573 | Webb, James M | N | N | N | Y | Y | Y |
| 904505003 | Webb, Sydney Marie | Y | N | N | N | N | N |
| 901214092 | Westfall, Marquita J | Y | N | N | N | N | N |
| 901214501 | Winters, Kevin Andrew | Y | N | N | Y | Y | Y |
| 901214745 | Woods, Christopher Michael | N | N | N | N | Y | Y |

Total Number of Graduates: 67 Number of Waivers: 6 Number of CCR: 59

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

1117 Excel Center Shelbyville

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | |
| 2016 4 Year Graduation Rate: | |
| 2016 Graduation Rate Improvement: | |
| 2017 4 Year Graduation Rate: | 0 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **0** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 15 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 67 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 82 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 74.5 |
| Graduation to Enrollment Percentage: | 20.13 |
| Multiply the Graduation to Enrollment Percentage by 4: | 80.52 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **80.52** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 80.52 | 0.9 | 72.47 |
| Graduation Rate: | 00.00 | 0.1 | 0.00 |
| | | | 72.47 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 100.0% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **72.47** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 93.33 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 72.47 | 0.2 | 14.5 |
| College & Career Readiness Score: | 100.00 | 0.8 | 80.0 |
| | | **Overall Points:** | **94.5** |
| | | **Overall Grade:** | **A** |

1117 Excel Center Shelbyville

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 111717039 | Braden, Shawn Tracy | N | N | N | Y | N | Y |
| 772101803 | Crane, Nina Morgan | N | N | N | Y | N | Y |
| 111717024 | Davis, Jessica Renee | N | N | N | Y | Y | Y |
| 039205101 | Glackman, Jenaka Rain | N | N | N | Y | N | Y |
| 126902175 | Hammond, Jasmine Leigh | N | N | N | Y | N | Y |
| 772101069 | Lockridge, Malholla Dawn | N | N | N | Y | N | Y |
| 256505011 | Mcclatchey, Nicole Arlene | N | N | N | Y | N | Y |
| 041306084 | Morris, Kevin Michael | N | N | N | Y | N | Y |
| 545302333 | Smothers, Crystal Cherie | N | N | N | N | N | N |
| 773305154 | Spurling, Morgan Grace | N | N | N | Y | N | Y |
| 127702078 | Sweet, Brianna Nicole | N | N | N | Y | N | Y |
| 111717004 | Talbert, Brian S | N | N | N | Y | Y | Y |
| 772501537 | Wachtel, Magi Dee | N | N | N | Y | Y | Y |
| 772504175 | Weddle, Mollie Detra | N | N | N | Y | N | Y |
| 772505172 | Witte, Logan Alexander | N | N | N | Y | N | Y |

Total Number of Graduates: 15 Number of Waivers: 0 Number of CCR: 14

# 2017 Adult High School Grade Calculation
# (per 511 IAC 6.3)

5749 Excel Center University Heights

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 13.7 |
| 2016 4 Year Graduation Rate: | 9.6 |
| 2016 Graduation Rate Improvement: | 4.1 |
| 2017 4 Year Graduation Rate: | 21.35 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **25.45** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 72 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 373 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 382 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 377.5 |
| Graduation to Enrollment Percentage: | 19.07 |
| Multiply the Graduation to Enrollment Percentage by 4: | 76.28 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **76.28** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 76.28 | 0.9 | 68.65 |
| Graduation Rate: | 25.45 | 0.1 | 2.55 |
| | | | 71.20 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 95.8% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **71.20** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 95.83 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 71.20 | 0.4 | 28.5 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **88.5** |
| | | **Overall Grade:** | **B** |

5749 Excel Center University Heights

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 343905070 | Adkins, Cheyenne | N | N | N | Y | N | Y |
| 708202722 | Baldridge, Brandon | N | N | N | Y | Y | Y |
| 343503053 | Beck, Nathaniel Young | N | N | N | Y | Y | Y |
| 530913089 | Bel, David Vanlal | N | N | N | N | Y | Y |
| 519302419 | Belfi, Melinda L | N | N | N | Y | Y | Y |
| 518502038 | Brewer, Cheyanne Marie | N | N | N | Y | N | Y |
| 634902107 | Brock, Stormy Lee | N | N | N | Y | N | Y |
| 556405025 | Brown, Brandi Leeann | N | N | N | N | Y | Y |
| 553704026 | Buie, Keesha Renee | N | N | N | Y | N | Y |
| 551503043 | Caldwell, Tai L | N | N | N | Y | Y | Y |
| 558106048 | Cerino, Alexander | N | N | N | Y | N | Y |
| C34902135 | Coleman, Jacob Andrew | N | N | N | N | N | N |
| 574916117 | Collins, Jammie Lee | N | N | N | Y | N | Y |
| 546305035 | Crawley, Cainon Michael | N | N | N | Y | N | Y |
| 530702010 | Crist, Marla M | N | N | N | Y | N | Y |
| 342306002 | Elmore, Brianna Faith | N | N | N | Y | N | Y |
| 566912540 | Engmawii, Pency | Y | N | N | Y | Y | Y |
| 561401041 | Escareno, Becky | N | N | N | Y | N | Y |
| 554604013 | Fager, Malina Shinaye | N | N | N | Y | N | Y |
| 537204060 | Fallowfield, Ashley | N | N | N | N | Y | Y |
| 574916292 | Figy, Matthew | N | N | N | Y | Y | Y |
| 574916290 | Gilbert, Denae L | N | N | N | Y | N | Y |
| 638104025 | Godinez, Gabriella Guadalupe | N | N | N | Y | N | Y |
| 566916361 | Gonzalez, Julie Victoria | N | N | N | Y | Y | Y |
| 535102019 | Gordon, Gabrielle Rachell | N | N | N | Y | N | Y |
| C39003065 | Hess, Isaac Paul | N | N | N | N | N | N |
| 574916303 | Hmung, Daniel Piang Lian | N | N | N | Y | Y | Y |
| 566916152 | Hngaka, Lal Ram | N | N | N | N | N | N |
| 566916024 | Holder, Alesha Yvette | N | N | N | Y | N | Y |
| 348304257 | Holman, Nicole Marie | N | N | N | Y | N | Y |
| 566913789 | Hualngo, Lalrinsiami | N | N | N | Y | N | Y |
| 546900350 | Kennedy, Kellie Michelle | N | N | N | Y | N | Y |
| 532505114 | Kessinger, Christina Dawn | N | N | N | Y | N | Y |
| 532502580 | Kessinger, Lindie Nichole | N | N | N | Y | N | Y |
| 534705015 | Leath, Tiana Suzanne | N | N | N | Y | N | Y |
| 518906004 | Luttrell, Caitlyn Nicole | N | N | N | Y | N | Y |
| 532507154 | Marin, Jose Manuel | N | N | N | Y | N | Y |

5749 Excel Center University Heights

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 552102164 | Marin, Adriana | N | N | N | N | Y | Y |
| 574916304 | Mawi, Rachel Thian Za | Y | N | N | Y | Y | Y |
| 530105053 | May, Dottie Dakota Kay | N | N | N | Y | Y | Y |
| 527902501 | Mcclung, Jeffrey Nicholas | N | N | N | Y | N | Y |
| 556702162 | Mcfarland, Heather Marie | N | N | N | Y | N | Y |
| 557804006 | Mckane, Joshua Lee | N | N | N | Y | Y | Y |
| 537702376 | Mitchell, Theresa Denise | N | N | N | Y | N | Y |
| 527902547 | Mora, Jasubileem Sarai | N | N | N | Y | N | Y |
| 559001048 | Noriega, Viridiana | N | N | N | N | Y | Y |
| 551402259 | Perkins, Charnica L | N | N | N | Y | Y | Y |
| 519204319 | Pettry, Richard Eugene | N | N | N | Y | N | Y |
| 535104028 | Place, Justin Micheal | N | N | N | Y | Y | Y |
| 561405047 | Radford, Ariah Lee | N | N | N | Y | N | Y |
| 527302502 | Raymond, Jasup Andrew | N | N | N | Y | N | Y |
| 249205151 | Rieman, Jacob | N | N | N | Y | N | Y |
| 559005012 | Rivera, Jocelyn | N | N | N | Y | N | Y |
| 552801099 | Robbins, Kayla M | N | N | N | Y | N | Y |
| 519203049 | Service, Chelsea Diana | N | N | N | Y | N | Y |
| 638703077 | Simpson, Jacob Christopher | N | N | N | Y | Y | Y |
| 574916329 | Small, Tammy Lynn | N | N | N | Y | N | Y |
| 557804012 | Smith, Lexus Lynn | N | N | N | Y | N | Y |
| 533702687 | Stader, Victoria Lynn | N | N | N | Y | N | Y |
| 257704006 | Stevens, Ashley Marie | N | N | N | N | Y | Y |
| 553902211 | Stinson, Sabrina K | N | N | N | Y | N | Y |
| 529014074 | Stucky, Naomi Abigail | N | N | N | Y | N | Y |
| 529014073 | Stucky, Seth Jorim | N | N | N | Y | N | Y |
| 554903233 | Suarez, Abraham J | N | N | N | Y | N | Y |
| 566916805 | Thang, Isaac Lalchan | N | N | N | Y | N | Y |
| 574916375 | Thiam, Sung | N | N | N | Y | Y | Y |
| 616204053 | Thomas, Ethan Robert | N | N | N | Y | N | Y |
| 829303039 | Tucker, Kaden Zachary | N | N | N | N | Y | Y |
| 524105091 | Venegas, Kimberly | N | N | N | Y | N | Y |
| 528817009 | Whipple, Tara A | N | N | N | Y | N | Y |
| 574916219 | Whitman, Marcella Gwen | Y | N | N | Y | Y | Y |
| 551412278 | Williams, Kayla M-L | N | N | N | Y | N | Y |

Total Number of Graduates: 72 Number of Waivers: 3 Number of CCR: 69

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

2976 Excel Center Kokomo

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 39.7 |
| 2016 4 Year Graduation Rate: | 31.9 |
| 2016 Graduation Rate Improvement: | 7.8 |
| 2017 4 Year Graduation Rate: | 28.11 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **35.91** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 87 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 330 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 335 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 332.5 |
| Graduation to Enrollment Percentage: | 26.17 |
| Multiply the Graduation to Enrollment Percentage by 4: | 104.68 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **100.00** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 100.00 | 0.9 | 90.00 |
| Graduation Rate: | 35.91 | 0.1 | 3.59 |
| | | | 93.59 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 89.7% | Mulitply by: | 0.897 |
| | | **Graduation Calculation Score:** | **83.95** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 96.55 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 83.95 | 0.4 | 33.6 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **93.6** |
| | | **Overall Grade:** | **A** |

2976 Excel Center Kokomo

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 297614726 | Akers, Jason Robert | N | N | N | Y | Y | Y |
| 298104000 | Baker, Quentin David | N | N | N | Y | Y | Y |
| 603504013 | Bales, Steven | N | Y | N | Y | N | Y |
| 289606008 | Barber, Krista Nikole | N | N | N | Y | N | Y |
| 290906067 | Beachy, Joshua Michael | N | N | N | Y | Y | Y |
| 869402257 | Blair, Christopher A | Y | N | N | Y | Y | Y |
| 294706055 | Boardman, Kamryn Shea Anna | N | N | N | N | Y | Y |
| 364202465 | Bradley, Ashley Lynn | N | N | N | Y | Y | Y |
| 605105205 | Bretzman, Drew Marcum | N | N | N | Y | Y | Y |
| 297614484 | Brewer, Evan Leigh | N | N | N | N | Y | Y |
| 177306113 | Bunce, Taylor Bailey | N | N | N | Y | N | Y |
| 603504020 | Butner, Johnathon Richard | N | N | N | N | Y | Y |
| 815503079 | Carlile, Nathan Daniel | N | N | N | Y | Y | Y |
| 297614595 | Cast, Jennifer L | Y | N | N | Y | N | Y |
| 300902230 | Causey, Cadence Shanti | N | N | N | N | Y | Y |
| 096102087 | Church, Vanessa Van | N | N | N | N | Y | Y |
| 295705003 | Clark, Joshua | N | N | N | Y | Y | Y |
| 301317084 | Collins, Jennifer Lisbeth | N | N | N | Y | Y | Y |
| 294505135 | Cook, Shania Leanne | N | N | N | Y | N | Y |
| 062902665 | Davis, Ceirra Lynn | N | N | N | Y | Y | Y |
| 062902115 | Diveley, Melanie Larissa | N | N | N | Y | Y | Y |
| 603507083 | Dordoni, Constantine Ali | N | N | N | Y | N | Y |
| 300506064 | Duke, Brian Louis | N | N | N | N | Y | Y |
| 294704013 | Dulin, Trent James | N | N | N | Y | Y | Y |
| 296104004 | Dumoulin, Alexis Kay | N | N | N | N | Y | Y |
| 296102423 | Dunn, Clarissa Renae | N | N | N | Y | N | Y |
| 296106081 | Fetterhoff, Abbigail Grace | N | N | N | Y | N | Y |
| 294705019 | Fivecoate, Karalyna Hope | N | N | N | Y | Y | Y |
| 297614707 | Garber, Melissa Lynn | N | N | N | Y | N | Y |
| 290504046 | Garcia, Ricky Valencia | N | N | N | Y | N | Y |
| 300906016 | Gifford, Tori Joann | N | N | N | Y | N | Y |
| 815405062 | Gomez, Jessie Hope | N | N | N | Y | N | Y |
| 300502231 | Graves, Jade Annetoinette | N | N | N | Y | Y | Y |
| 603503032 | Herron, Kristen Lynae | N | N | N | Y | Y | Y |
| 554905074 | Hodge, Hannah Lynne | N | N | N | Y | Y | Y |
| 609705027 | Howell, Dakota | N | N | N | Y | N | Y |
| 296903083 | Hughes, Kyle Brandon | N | N | N | Y | N | Y |

2976 Excel Center Kokomo

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 301301887 | Huntsman, Amanda Renee | Y | N | N | Y | Y | Y |
| 297615094 | Hutto, Benjamin David | N | N | N | Y | Y | Y |
| 290903186 | Isham, Christian Allen | Y | N | N | Y | Y | Y |
| 543905075 | Kellogg, Hunter Lee | N | N | N | Y | Y | Y |
| 603505042 | Kilcline, David Alexander | N | N | N | Y | Y | Y |
| 290406016 | Kirby, Abbigayle Angel | N | N | N | N | Y | Y |
| 815403228 | Kochenderfer, Kristin A | N | N | N | N | Y | Y |
| 071105034 | Koebler, Michael Lee | N | N | N | Y | N | Y |
| 293506159 | Lamb, Taylor Hope | N | N | N | Y | Y | Y |
| 290906030 | Laubsch, Nathaniel Edison | N | N | N | Y | Y | Y |
| 290503025 | Locke, Natasha Marie | N | N | N | Y | N | Y |
| 290504032 | Martin, Colby Derwyn | N | N | N | Y | Y | Y |
| 290503019 | Martin, Hayley Laureen | Y | N | N | Y | N | Y |
| 295302096 | Mcguire, Leah Brooke | N | N | N | Y | N | Y |
| 301303774 | Mckay, Amanda Maxine | N | N | N | N | N | N |
| 297614855 | Mendoza, Brandi Leann | N | N | N | Y | Y | Y |
| 295305001 | Meyers, Adreauna Evellen | N | N | N | N | N | N |
| 601206142 | Miller, Somerset Dawn | N | N | N | N | Y | Y |
| 603207011 | Mitchell, Pamela Sue | N | N | N | Y | N | Y |
| 289503157 | Oyler, Austin Carl | N | N | N | Y | Y | Y |
| 293506168 | Parigen, Kaylee Alan | Y | N | N | Y | Y | Y |
| 294501019 | Riley, Jaysen Elisha | N | N | N | Y | Y | Y |
| 297615092 | Rish, Lucus | N | N | N | Y | Y | Y |
| 289504273 | Rose, Isis Elaeyn | N | N | N | Y | N | Y |
| 297614817 | Sargent, Laura Lyn | N | N | N | Y | Y | Y |
| 069502434 | Schmidt, Julie L | N | N | N | Y | Y | Y |
| 296902276 | Schwartz, Emily Kaitlyn | N | N | N | Y | N | Y |
| 259702328 | Sexton-Manifold, Alesia Kathleen | N | N | N | N | Y | Y |
| 067303072 | Smith, Kaitlyn Elizabeth | N | N | N | Y | N | Y |
| 608902319 | Smith, Katrina L | N | N | N | Y | Y | Y |
| 289602232 | Smith, Diamond Che'mire | N | N | N | Y | N | Y |
| 548508006 | Smith-White, Jamal Jaquan | N | N | N | Y | Y | Y |
| 297614581 | Steele, Nicole Ann | Y | N | N | Y | Y | Y |
| 147003070 | Stephens, Nathaniel Ray | N | N | N | N | N | N |
| 297614497 | Stettler, Slobodanka | Y | N | N | Y | Y | Y |
| 296905051 | Stines, Megan Renee | N | N | N | N | Y | Y |
| 541808044 | Stitts, Nicholas Lionel | N | N | N | Y | N | Y |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 603504071 | Stuber, Sidney Leean | N | N | N | Y | N | Y |
| 300502218 | Swank, Brandon Donovan | N | N | N | Y | Y | Y |
| 301314033 | Swofford, Ashley Nicole | N | N | N | Y | Y | Y |
| 297614721 | Taylor, Stephanie Lynn | N | N | N | Y | N | Y |
| 815403567 | Turbyfill, Angel Mae | N | N | N | Y | N | Y |
| 299306082 | Valdes, Elana Nicole | N | Y | N | Y | Y | Y |
| C86504005 | Waller, Kyla Rana | N | N | N | N | Y | Y |
| 815503505 | Warner, Wesley Aaron | N | N | N | Y | Y | Y |
| 403703052 | Watts, Danielle Marie | N | N | N | Y | Y | Y |
| 293504034 | Welch, Michaela Dawn | N | N | N | Y | N | Y |
| 297614753 | Wicklund, Michael Iver | N | N | N | Y | Y | Y |
| 297614661 | Williamson, Velinda | Y | N | N | N | Y | Y |
| 609702240 | Wright, Kaitlyne | N | N | N | Y | N | Y |

Total Number of Graduates: 87 Number of Waivers: 9 Number of CCR: 84

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

4904 Excel Center Anderson

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 26.8 |
| 2016 4 Year Graduation Rate: | 25.4 |
| 2016 Graduation Rate Improvement: | 1.4 |
| 2017 4 Year Graduation Rate: | 17.96 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **19.36** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 52 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 296 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 263 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 279.5 |
| Graduation to Enrollment Percentage: | 18.60 |
| Multiply the Graduation to Enrollment Percentage by 4: | 74.40 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **74.40** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 74.40 | 0.9 | 66.96 |
| Graduation Rate: | 19.36 | 0.1 | 1.94 |
| | | | 68.90 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 88.5% | Mulitply by: | 0.885 |
| | | **Graduation Calculation Score:** | **60.97** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 96.15 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 60.97 | 0.4 | 24.4 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **84.4** |
| | | **Overall Grade:** | **B** |

4904 Excel Center Anderson

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 495704116 | Amos, Savannah | N | N | N | Y | N | Y |
| 503301397 | Bautista, Amanda Nicole | N | N | N | Y | N | Y |
| 497701194 | Bennett, Patrick W | Y | N | N | Y | N | Y |
| 506905005 | Brake, Austin Lee | N | N | N | Y | Y | Y |
| 512301395 | Buster, Quincy Thomas | N | N | N | Y | N | Y |
| 527609002 | Chigo, Nayeli | N | Y | N | N | N | Y |
| 507902406 | Clay, Noel D | N | N | N | Y | N | Y |
| 495704140 | Duncan, Devlin Storm | N | N | N | Y | N | Y |
| 510901214 | Farley, Quintien | N | N | N | Y | N | Y |
| 508102622 | Flanigan, Kyle | N | N | N | Y | Y | Y |
| 514205136 | Fuller-Carter, Kaila Mikelle | Y | N | N | Y | Y | Y |
| 503305163 | Gates, Jacob Austin | N | N | N | Y | Y | Y |
| 510903123 | Griffey, Breanna Marie | N | N | N | Y | N | Y |
| 494502182 | Harris, Emily | N | N | N | Y | N | Y |
| 490414796 | Headen, Natiezia | N | N | N | Y | Y | Y |
| 503306064 | Heagy, Emily Rose | N | N | N | Y | N | Y |
| 490414548 | Hopgood, Belinda C | N | N | N | Y | N | Y |
| 490414607 | Hopkins, Malik U-Riah | N | N | N | Y | N | Y |
| 545102042 | Jenkins, Ramarq Antonio Carl | N | N | N | Y | N | Y |
| 514405110 | Jones, Elvis P | N | N | N | Y | N | Y |
| 490414798 | Kelly, Karla Ann | N | N | N | Y | Y | Y |
| 512301795 | Kelly, Breanna Kay | N | N | N | Y | N | Y |
| 503301204 | Kocher, Monica R | N | N | N | Y | N | Y |
| 503704039 | Lamey, Brian Austin Matthew | N | Y | N | N | N | Y |
| 512303155 | Mahla, Justin Tylor | N | N | N | Y | N | Y |
| 494501287 | Maldonado, Marisol | Y | N | N | Y | N | Y |
| 520004044 | Mattingly, Kyleigh Christine | N | N | N | Y | N | Y |
| 528903336 | Mitchell, Krystal Danielle | N | N | N | N | Y | Y |
| 504902299 | Montgomery, Courtney Danielle | N | N | N | Y | N | Y |
| 490414791 | Morse, Julia Beth | N | N | N | Y | N | Y |
| 500902760 | Mosbaugh, Samantha Nichole | N | N | N | Y | Y | Y |
| 512901293 | Newell, Chelsea Nicole | Y | N | N | Y | N | Y |
| 794411046 | Ogle, Destyn | N | N | N | N | Y | Y |
| 503304180 | Pacheco, Hortencia M | N | N | N | N | Y | Y |
| 506403039 | Poland, Kymberlynn Mikeayla Jean | N | N | N | Y | N | Y |
| 490414402 | Ramirez, Cresencio | Y | N | N | N | N | N |
| 241303028 | Reyes, Aleah Elaine | N | N | N | Y | N | Y |

4904 Excel Center Anderson

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 497706020 | Richardson, Tyleyah Kayleen | N | N | N | Y | Y | Y |
| 490414187 | Rodriguez, Diana W | N | N | N | Y | Y | Y |
| 490414390 | Romero, Vanessa R | N | N | N | Y | Y | Y |
| 490414581 | Saylor, Amanda Robin | N | N | N | Y | N | Y |
| 504902164 | Shaw, Tracy R | N | N | N | Y | N | Y |
| 515706043 | Shelley, Katie Louise | N | N | N | Y | N | Y |
| 504902627 | Spence, Ashley Marie | N | N | N | Y | Y | Y |
| 515706072 | Virgil, Charmony Charley | N | N | N | Y | Y | Y |
| 512305115 | Walker, Joshua Robert | N | N | N | Y | N | Y |
| C22604331 | Ward, Sebastian Lee | N | N | N | N | N | N |
| 301301744 | Webb, Latish M | N | N | N | Y | Y | Y |
| 490414683 | Weber, Alana | N | N | N | Y | Y | Y |
| 506902387 | Welsh, Colt Holiday | N | Y | N | Y | Y | Y |
| 497701532 | White, Kyle Louis | Y | N | N | Y | N | Y |
| 510901160 | Young, Nickalous | N | N | N | Y | N | Y |

Total Number of Graduates: 52 Number of Waivers: 6 Number of CCR: 50

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

5669 Excel Center for Adult Learners

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 28.5 |
| 2016 4 Year Graduation Rate: | 22.6 |
| 2016 Graduation Rate Improvement: | 5.9 |
| 2017 4 Year Graduation Rate: | 23.55 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **29.45** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 223 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 994 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 897 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 945.5 |
| Graduation to Enrollment Percentage: | 23.59 |
| Multiply the Graduation to Enrollment Percentage by 4: | 94.36 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **94.36** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 94.36 | 0.9 | 84.92 |
| Graduation Rate: | 29.45 | 0.1 | 2.95 |
| | | | 87.87 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 90.6% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **87.87** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 93.72 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 87.87 | 0.4 | 35.1 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **95.1** |
| | | **Overall Grade:** | **A** |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 539504065 | Adams, Juzareya Clara-Gean | N | N | N | Y | N | Y |
| 566914167 | Allen, Joseph Anellish | N | N | N | Y | N | Y |
| 566916546 | Almanza, Dorthea Jean | Y | N | N | Y | N | Y |
| 566915740 | Alvarez, Magdalena | N | N | N | Y | N | Y |
| 555702168 | Anderson, Tabitha A | N | N | N | Y | N | Y |
| 560307033 | Anderson-Dinsmore, Elizabeth Leanne | N | N | N | Y | N | Y |
| 558204017 | Angel, Nicole Marie | N | N | N | Y | N | Y |
| 545703011 | Apple, Christopher Jesse | N | N | N | Y | N | Y |
| 554204016 | Armstrong, Aryanna Renee | N | N | N | Y | N | Y |
| 528905046 | Atre, Chiragh Tarun | N | N | N | Y | Y | Y |
| 566915009 | Azad, Mosammath Miniara | Y | N | N | N | Y | Y |
| 551100001 | Bacon, Lamar L | N | N | N | Y | N | Y |
| 527002586 | Baker, Dezaray M | N | N | N | N | N | N |
| 411702081 | Barnes, Andriana S | N | N | N | Y | N | Y |
| 566912527 | Bates, Teonna M | Y | N | N | Y | N | Y |
| 566913754 | Bays, Maria I | Y | N | N | Y | Y | Y |
| 560506031 | Bell, Da-Jana Lamonyea | N | N | N | Y | N | Y |
| 566916550 | Benda, Sadiki | N | N | N | Y | Y | Y |
| 546102231 | Bent, Karashya Sade | N | N | N | N | Y | Y |
| 537302113 | Bernard, Gregory | N | N | N | Y | N | Y |
| 549401370 | Bishop, Whitney M | Y | N | N | N | N | N |
| 296904002 | Black, Malik Eugene | N | N | N | Y | N | Y |
| C61004064 | Bluitt, William Anthony | N | Y | N | N | Y | Y |
| 529805005 | Bohannon, Chasitie Tyson | N | N | N | Y | N | Y |
| 561000371 | Booker, Astria L | N | N | N | Y | N | Y |
| 408702372 | Brewer, Nathaniel Jordon | N | N | N | Y | Y | Y |
| 525702047 | Bricker, Jolene Dawn | N | N | N | Y | Y | Y |
| 559202197 | Brookins, Tayvionna Anya | Y | N | N | Y | N | Y |
| 527403087 | Brown, Ryan Alexander | N | N | N | Y | N | Y |
| 543004196 | Brown, Denairea Nashae | Y | N | N | Y | N | Y |
| 559005043 | Burdine, Kourtney Monique | N | N | N | Y | Y | Y |
| 150902422 | Butler, Ronisha Rosemary Jane | N | N | N | Y | N | Y |
| 560502046 | Butler, Erikka E | N | N | N | Y | N | Y |
| 527603290 | Carson, Carrie Ann | N | N | N | Y | Y | Y |
| 556002042 | Carter, Patrick Dean | N | N | N | Y | N | Y |
| 566912045 | Cash, Meneka M | N | N | N | Y | Y | Y |
| 566913244 | Chabani, Wafaa | N | N | N | Y | Y | Y |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 555707063 | Clark, Eric Bernard | N | N | N | Y | N | Y |
| 551502255 | Colin, Miriam Yazmin | N | N | N | Y | N | Y |
| 555801067 | Collins, Katelynn N | N | N | N | Y | N | Y |
| 551404011 | Coomer, David Austin | N | N | N | Y | N | Y |
| 519204100 | Couch, Sedona Lyn | N | N | N | Y | Y | Y |
| 558303071 | Crabtree, Toni S | N | N | N | Y | Y | Y |
| 553702187 | Crawford, Natasia A | Y | N | N | Y | N | Y |
| 252709107 | Croddy, Robert | Y | N | N | Y | N | Y |
| 556902223 | Crook, Kendra L | N | N | N | Y | N | Y |
| 554203107 | Croom, Cevountaye Shermain | N | N | N | Y | Y | Y |
| 533702493 | Culp, Corey Chandler | N | N | N | Y | N | Y |
| 525702585 | Culpepper, Sabrie Marcella | N | N | N | Y | N | Y |
| 240902078 | Cyrus, Khalel D | N | N | N | Y | N | Y |
| 529803583 | Davenport, Ajahnique K | N | N | N | Y | N | Y |
| 405703123 | Davis, Essence J | N | N | N | N | N | N |
| 522202691 | Day, Sheleah J | N | N | N | N | N | N |
| 566914779 | Debaun, Corinne Kay | N | N | N | Y | N | Y |
| 564301207 | Dinkins, Se'lara | N | N | N | N | Y | Y |
| 013704017 | Dozier, Cierra Alise | N | N | N | Y | N | Y |
| 553902256 | Drain, Asiah D | N | N | N | Y | Y | Y |
| 562302108 | Dugan, Christopher D | N | N | N | Y | Y | Y |
| 560101092 | Durham, Ayana | N | N | N | Y | Y | Y |
| 529109021 | Eatmon, Shanna Michelle | N | N | N | Y | N | Y |
| 535903098 | Edwards, Semaja M | N | N | N | Y | N | Y |
| 561207006 | English, Javon D | N | N | N | Y | Y | Y |
| 566913129 | Evans, Shaunikki M | N | N | N | Y | N | Y |
| 549801080 | Fisher, Taira L | N | N | N | Y | N | Y |
| 546902264 | Fitts, Deshawn L | Y | N | N | Y | N | Y |
| 566916642 | Flores, Elizabeth | N | N | N | Y | Y | Y |
| 535105016 | Floyd, Jalan Michael | N | N | N | Y | N | Y |
| 555802210 | Funez Antunez, Roselyn Dayana | N | N | N | Y | Y | Y |
| 535908081 | Garcia, Jocelyne Anai | N | N | N | Y | N | Y |
| 532504226 | Garfias, Rafael | N | N | N | Y | N | Y |
| 566915714 | Gilbert, Brittney Tierra | N | N | N | N | N | N |
| 574916047 | Gold, Deandrea Renee | N | N | N | Y | N | Y |
| 566916156 | Gomez, Teresa | N | N | N | Y | Y | Y |
| 558101003 | Gonzalez, Monserrat C | N | N | N | Y | N | Y |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 554805004 | Gray, Jamal Glenn | N | N | N | Y | N | Y |
| 554997013 | Green, Matthew William | N | N | N | Y | Y | Y |
| 559207103 | Griffin, Israel Josiah | N | N | N | Y | N | Y |
| 532104054 | Gut, Benjamin Jurgen | N | N | N | Y | N | Y |
| C67002174 | Hair, Derrik Mitchell | N | N | N | Y | Y | Y |
| 553702165 | Hampton, Demarcus D | N | N | N | Y | N | Y |
| 503306030 | Hampton, Dawnecia Denise | N | N | N | Y | Y | Y |
| 566917373 | Harris, Tina Ladon | N | N | N | Y | N | Y |
| 554302154 | Harris, Lesean D | N | N | N | Y | N | Y |
| 405701069 | Harris, Mario Antonio | N | N | N | Y | N | Y |
| 272703023 | Harrison, Emily Nicole | N | N | N | Y | Y | Y |
| 555410071 | Hayes, Jonathan Joseph | N | N | N | Y | Y | Y |
| 554407048 | Hayes, Kenyett Eunice | N | N | N | Y | N | Y |
| C39502191 | Henderson, Mitchell E | N | N | N | N | Y | Y |
| 559602145 | Henriquez, Christian | N | N | N | Y | N | Y |
| 552703030 | Hill, Tommisha | N | N | N | Y | N | Y |
| 566916936 | Hopson, Billi Jo | N | N | N | Y | N | Y |
| 556501052 | Horton, Patrick F | N | Y | N | Y | N | Y |
| 562307070 | Hughett, Tymothy John | N | N | N | Y | N | Y |
| 562307071 | Hughett, Cayleb Jordan | N | N | N | N | Y | Y |
| 557902202 | Hurt, Quincy Lamont | N | N | N | Y | N | Y |
| 410902329 | Jackson, Kwofi Ashanti | N | N | N | Y | N | Y |
| 566914391 | Jefferson, Christopher Darnell | N | N | N | Y | N | Y |
| C77308260 | Johnson, Varita | N | N | N | N | Y | Y |
| 547700283 | Johnson, Samantha M | N | N | N | Y | N | Y |
| 549802096 | Johnson, Cedric Ashton J | Y | N | N | Y | N | Y |
| 561902184 | Johnson, Nastasha D | N | N | N | Y | N | Y |
| 566916962 | Johnson, Lemont | N | N | N | Y | N | Y |
| 560100140 | Johnson, Teyonia Denise | N | N | N | Y | N | Y |
| 559097022 | Jones, Jalen | N | N | N | Y | N | Y |
| 554903138 | Jones, Harley J | N | N | N | Y | N | Y |
| 559102246 | Jones, Jaiquan A | N | N | N | Y | Y | Y |
| 560106013 | Jones, Na'quanda | N | N | N | Y | N | Y |
| 566916515 | Jones, Donlisa Charlene | Y | N | N | Y | N | Y |
| 554802212 | Jordan, Donovan Nathan | N | N | N | Y | N | Y |
| C72303197 | Larsuel, Keivon E | N | N | N | N | N | N |
| 566916077 | Leake, Brenda | N | N | N | Y | N | Y |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| C40002038 | Lee, Thomas Calvin | N | N | N | N | Y | Y |
| 553104035 | Lewis, Darius | N | N | N | Y | N | Y |
| 538603136 | Lloyd, Jazmin Anjelia | N | N | N | Y | N | Y |
| 591216003 | Logan, James Shawn | N | N | N | Y | N | Y |
| 556703076 | Long, Alexis Denise | N | N | N | Y | N | Y |
| 535404123 | Lopez, Erik Alfonso | N | N | N | Y | N | Y |
| 554302193 | Mack, Sara L | N | N | N | Y | N | Y |
| 565597191 | Mack, Micaela T | Y | N | N | Y | Y | Y |
| 566916795 | Maddix, Chevon Patrice | N | N | N | Y | N | Y |
| 563900518 | Martinez, Cynthia M | N | N | N | Y | Y | Y |
| 557903168 | Massey, Shawkie T | N | N | N | Y | N | Y |
| 554903186 | Mcgill, Jamie Michelle Nicole | N | N | N | Y | N | Y |
| 552801138 | Mcgill, Vanessa | N | N | N | N | N | N |
| 547302061 | Mcnary, Antoinette M | N | N | N | Y | N | Y |
| 406502480 | Mercer, Lee | N | N | N | Y | N | Y |
| 537005030 | Meriweather, Onjahney L | N | N | N | Y | N | Y |
| 548104087 | Mondragon, Anayeli R | N | N | N | Y | N | Y |
| 566916668 | Montesdeoca, Ayde | N | N | N | Y | N | Y |
| 559001043 | Montgomery, Taylor N | N | N | N | Y | N | Y |
| 527903834 | Montoya, Leslie Y | N | N | N | Y | N | Y |
| 541805008 | Mora, Brenda | N | N | N | N | Y | Y |
| 566916528 | Morales, Marcela | N | N | N | Y | Y | Y |
| 558203124 | Morales, Rosvin E | N | N | N | Y | N | Y |
| 551501033 | Morris, Heather | N | N | N | Y | N | Y |
| 559802193 | Murkison, Jalen Thomas | N | N | N | Y | N | Y |
| 546501356 | Murrieta, Cristina | N | N | N | Y | Y | Y |
| 553903002 | O'haver, Kayla | N | N | N | N | Y | Y |
| 566916089 | Olivares, Georgina | Y | N | N | Y | N | Y |
| 566914109 | Orta, Gabriela | Y | N | N | N | Y | Y |
| 566912060 | Parker, Britney J | N | N | N | Y | N | Y |
| 566913249 | Penner, Lavia J | N | N | N | Y | N | Y |
| 564307041 | Perez, Jacquelene L | N | N | N | Y | Y | Y |
| 561003005 | Perryman, Lamanda D | N | N | N | Y | N | Y |
| 546904001 | Peterson, Naya Y | N | N | N | Y | N | Y |
| 556105022 | Powell, Katie | N | N | N | Y | N | Y |
| 566915044 | Powell, Anteressa Nacasha | N | N | N | Y | N | Y |
| 548808269 | Price, Caitlynn Drema | N | N | N | Y | N | Y |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 561000041 | Rachell, Matricia Lynn | Y | N | N | Y | N | Y |
| 559602218 | Ramos, Yeico M | N | N | N | N | Y | Y |
| C61002029 | Ray, Robert D | N | N | N | N | N | N |
| C61004055 | Rayner, Anre'a Lashawn | N | N | N | N | N | N |
| 543604052 | Reed, Fredrick Timothy | N | N | N | Y | N | Y |
| 317004032 | Robertson, Derick Ian | N | N | N | Y | N | Y |
| 529904068 | Robertson-Bey, Mare'on Donte' | N | N | N | N | Y | Y |
| 560102043 | Robinson, Shavondah | N | N | N | Y | N | Y |
| 557903140 | Robinson, Tatiana Nasha | N | N | N | Y | Y | Y |
| 481102052 | Robinson, Jasmine Tiana | N | Y | N | N | Y | Y |
| C72303116 | Robinson, Ayanna Maxine | N | N | N | N | N | N |
| 560703168 | Rosales Ramirez, Rubi Esmeralda | N | N | N | Y | N | Y |
| 566915242 | Roth, Cheyenne Matthew | N | N | N | Y | N | Y |
| 549407025 | Sanchez, Jose Isabel | Y | N | N | Y | N | Y |
| 549412033 | Sanchez Hernandez, Damaris | N | N | N | Y | Y | Y |
| 566916060 | Sanchez-Gonzales, Maria De Jesus | N | N | N | Y | Y | Y |
| 566917510 | Scanlan, Elizabeth | N | N | N | Y | N | Y |
| 537304012 | Scanlan, Kwainlisha Gena | N | N | N | Y | N | Y |
| 543906135 | Scott, Ariel Denise | N | Y | N | Y | Y | Y |
| 554203131 | Scruggs, Lamont M | N | N | N | Y | N | Y |
| 554904077 | Serrano, Alexis S | N | N | N | Y | N | Y |
| C65003110 | Sharp, William Thomas | N | N | N | N | N | N |
| 411702038 | Shelton, Carlton Anthony | N | N | N | Y | Y | Y |
| 856102278 | Shittu, Camorrie James | N | N | N | Y | Y | Y |
| 566916366 | Smith, Cody Terrell | N | N | N | Y | Y | Y |
| 556004048 | Smith, Darius D | N | N | N | Y | N | Y |
| 560604036 | Smith, Shy-Aire | N | N | N | N | N | N |
| 554803030 | Smith, Jonathan Avery | N | N | N | Y | N | Y |
| 273602428 | Spears, Jeremy Devon | N | N | N | Y | N | Y |
| 541804049 | Spells, Tailar Lynn | N | N | N | N | Y | Y |
| 549400550 | Spivey, Joyce M | N | N | N | Y | N | Y |
| 529603605 | Spivey, Jerry Jerome | N | N | N | Y | N | Y |
| 566915276 | Stanley, Kimberley Nicole | N | N | N | Y | N | Y |
| 535602029 | Stewart, Robin Shena | N | N | N | Y | N | Y |
| 591214665 | Strain-King, Whitney Shantel | N | N | N | Y | N | Y |
| 566915859 | Strong, Keandra | N | N | N | Y | N | Y |
| 560600048 | Sturm, Joshua | Y | N | N | N | N | N |

5669 Excel Center for Adult Learners

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 548501153 | Sweatt, Mary J | N | N | N | Y | Y | Y |
| 495304148 | Tahtinen, Shea Michael | N | N | N | Y | N | Y |
| 566914150 | Talbott, Desiree Tanice | N | N | N | Y | N | Y |
| 566914039 | Tamayo, Maria E | Y | N | N | Y | N | Y |
| 555802262 | Taylor, Ke'tashia T | N | N | N | Y | N | Y |
| 587905010 | Thomas, Tamika | Y | N | N | Y | N | Y |
| 555406014 | Thompson, Tyasia Lisette | N | N | N | Y | Y | Y |
| 566916669 | Thornton, Jamie Renee | N | N | N | Y | N | Y |
| 561904028 | Toussaint, Quiana Lashawn | N | N | N | Y | N | Y |
| 546903003 | Tunstall, Makiya R | N | N | N | Y | N | Y |
| 537303061 | Turner, Jericho Joshua | N | N | N | Y | Y | Y |
| 556703067 | Turner, Shantaya Shariece | N | N | N | Y | N | Y |
| 556903077 | Tyler, Eonna A R | N | N | N | Y | N | Y |
| 549407021 | Valle, Claudia Teresa | N | N | N | Y | N | Y |
| 560300046 | Vanhorn, Allyn R | N | N | N | Y | N | Y |
| 566916910 | Vazquez, David | N | N | N | Y | Y | Y |
| 559104003 | Velasco, Daniela | N | N | N | Y | Y | Y |
| 536100575 | Warren, Raeven | N | N | N | Y | Y | Y |
| 559202026 | Watson, Clintin J | N | N | N | Y | N | Y |
| 552314048 | Watson, Demetris Marquis | N | N | N | Y | N | Y |
| 535905108 | Westmoreland, Aaron Lee | N | N | N | Y | Y | Y |
| 559304001 | White, Dazisha Cheyenne | N | N | N | Y | N | Y |
| 566916364 | White, Tamisha | N | N | N | Y | N | Y |
| 556902135 | White, Michelle R | N | N | N | Y | N | Y |
| 543004064 | Wilborn, Asia Diane | N | N | N | N | Y | Y |
| 566916054 | Williams, Andrew Carl | N | N | N | N | N | N |
| 566917328 | Williams, Christal Guytisha | N | N | N | Y | N | Y |
| 538103137 | Williams, Donovan Carl | N | N | N | Y | N | Y |
| 566916596 | Williams, Lakisha Renee | N | N | N | N | Y | Y |
| 554203053 | Williams, Mique Raquel | N | N | N | Y | N | Y |
| 530103438 | Williams, Jasmine Symone | N | N | N | Y | Y | Y |
| 560705082 | Williams, Connie Marie | N | N | N | Y | Y | Y |
| 519774392 | Winkel, Kelly Ann | N | N | N | Y | N | Y |
| 566913151 | Wright, Monique X | Y | N | N | Y | N | Y |
| 546513026 | Yarbrough, Terrance | N | N | N | Y | N | Y |
| 554902222 | Young, Troy | N | Y | N | Y | N | Y |
| 566914410 | Young, Lakisha Johnson | N | N | N | Y | N | Y |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 558103047 | Zamora, Jonathan | N | Y | N | Y | Y | Y |

Total Number of Graduates: 223 Number of Waivers: 21 Number of CCR: 209

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

5912 Excel Center Lafayette Square

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 40 |
| 2016 4 Year Graduation Rate: | 29.3 |
| 2016 Graduation Rate Improvement: | 10.7 |
| 2017 4 Year Graduation Rate: | 20.83 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **31.53** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 78 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 378 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 363 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 370.5 |
| Graduation to Enrollment Percentage: | 21.05 |
| Multiply the Graduation to Enrollment Percentage by 4: | 84.20 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **84.20** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 84.20 | 0.9 | 75.78 |
| Graduation Rate: | 31.53 | 0.1 | 3.15 |
| | | | 78.93 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 91.0% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **78.93** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 93.59 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 78.93 | 0.4 | 31.6 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **91.6** |
| | | **Overall Grade:** | **A** |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 542104102 | Aceves, Hugo Armando | N | N | N | Y | N | Y |
| 566913675 | Alonso, David | N | Y | N | N | N | Y |
| 591214873 | Alvarez Cruz, Ivan Eduardo | N | N | N | Y | N | Y |
| 638104041 | Avalos Venegas, Carlos Orlando | N | N | N | Y | N | Y |
| 591414204 | Barry, Ramatoulaye | Y | N | N | N | N | N |
| 535802439 | Benitez, Leopoldo | N | N | N | Y | Y | Y |
| 557002078 | Bishop, Dedrick D | N | N | N | Y | Y | Y |
| 552004040 | Brown, Charles A | N | N | N | Y | N | Y |
| 566917093 | Buchanan, Cynthia Irene | N | N | N | Y | N | Y |
| 535706143 | Carbajal, Dulce Yaremi | N | N | N | Y | N | Y |
| 559097033 | Casco, Carlos | N | N | N | Y | Y | Y |
| 591215194 | Cayetano, Esteban C | N | N | N | Y | N | Y |
| 552102199 | Cegueda, Elizabeth | N | N | N | Y | N | Y |
| 566914135 | Chavarin, Ricardo Salamanca | N | N | N | N | N | N |
| 410402498 | Coleman, Bishop Maurice | N | N | N | Y | N | Y |
| 551313011 | Cortez-Lujano, Maria Trinidad | N | N | N | Y | N | Y |
| 535309074 | Cuevas, Alberto Carlos | N | N | N | N | N | N |
| 529903135 | Cunningham, Jaszmine Edreka Norah | N | N | N | Y | Y | Y |
| 557902318 | Davis, Joshua Rey | N | N | N | N | N | N |
| 591214695 | Duncan, Lareina Roxanne | Y | N | N | Y | Y | Y |
| 535605022 | Elizalde-Clara, Oscar E | N | N | N | Y | N | Y |
| 558700010 | Ellison, Natasha R | N | N | N | Y | N | Y |
| 564301020 | Felts, Keisah Shea | N | N | N | Y | N | Y |
| 561005030 | Flores, Claudia | N | N | N | Y | N | Y |
| 559002301 | Gamero, Selena Idalia | N | N | N | Y | N | Y |
| 535904017 | Glover, Demond Lamont | N | N | N | Y | N | Y |
| 563912005 | Godinez, Kevin A | N | Y | Y | Y | Y | Y |
| 566914258 | Harris, Tracey Renee' | N | N | N | Y | Y | Y |
| 556802281 | Hawkins, Brandon Irvin | N | N | N | Y | N | Y |
| 272008015 | Heindl, Ashley Lynn | N | N | N | Y | N | Y |
| 591214438 | Henrriquez, Ayde Yorlany | N | N | N | N | Y | Y |
| 559002091 | Hernandez, Ana C | N | N | N | Y | Y | Y |
| 410905045 | Holden, Tacorra | N | N | N | Y | Y | Y |
| 537804065 | Holly, Cecil Bernard | N | N | N | Y | N | Y |
| 761705051 | Hopkins, Carrington Kay | N | N | N | Y | N | Y |
| 536303101 | House, Montel Leon | N | N | N | Y | N | Y |
| 591215285 | Jarquin, Dalia E | N | N | N | Y | Y | Y |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 029104047 | Jennings, Harold Lloyd | N | N | N | Y | N | Y |
| 559802166 | Jones, Patrice Lynette | N | N | N | Y | N | Y |
| 548504033 | Lacy, Renique S | N | N | N | Y | Y | Y |
| 548109919 | Leal-Lagunes, Anahi | N | N | N | Y | Y | Y |
| 551405120 | Lebron, Taysha | N | N | N | Y | N | Y |
| 591215553 | Lonberger, Ursula M | N | N | N | N | Y | Y |
| 591215474 | Martinez, Yesenia | N | N | N | Y | Y | Y |
| 558104004 | Martinez, Ana Lesa | N | N | N | Y | N | Y |
| 527304076 | Martinez, Selena Natasha | N | N | N | Y | N | Y |
| 553907026 | Mccollum, Shandria Kenta | N | N | N | Y | N | Y |
| 167300440 | Mcelroy, Chanequa | N | N | N | Y | N | Y |
| 522107037 | Medina, Anggie | Y | N | N | Y | N | Y |
| 021703059 | Moore, Korrean La Shawn | N | N | N | Y | Y | Y |
| 153504196 | Moore-Ezell, Jakeyla | N | N | N | N | N | N |
| 591216040 | Nguyen, Hieu | N | N | N | Y | N | Y |
| 591214922 | Nyi, Nyi | Y | N | N | Y | Y | Y |
| 591215270 | Orr, Windy Tamika | Y | N | N | Y | Y | Y |
| 545197941 | Palmer, Sabrina Claire | Y | N | N | Y | Y | Y |
| 560702153 | Pate, Ruth Dominique Ayann | N | N | N | Y | N | Y |
| 591215052 | Perez Marinez, Reyven | N | N | N | N | Y | Y |
| 591215523 | Plascencia, Martha C | N | N | N | Y | Y | Y |
| 559002202 | Qualls, Joshua Andrew | N | N | N | Y | Y | Y |
| 591215209 | Rebbah, Atika | Y | N | N | Y | Y | Y |
| 559602102 | Reyes, Francisca | N | N | N | Y | N | Y |
| 591214538 | Rivas, Jaime | N | N | N | N | Y | Y |
| 591214518 | Rivera, Juan C | N | N | N | Y | Y | Y |
| 545101128 | Rivers, Sophia L | N | N | N | Y | N | Y |
| 526703057 | Robertson, Jasmine N | N | N | N | Y | N | Y |
| 591215424 | Rodriguez, Veronica Deidad | N | N | N | Y | N | Y |
| 591215853 | Rojas, Yessica Monserrat | N | N | N | Y | Y | Y |
| 250702196 | Rust, Kendra Lyn | N | N | N | N | Y | Y |
| 591215428 | Santiago, Maria Jesus | N | N | N | Y | Y | Y |
| 591215591 | Staten, Fransheria | N | N | N | Y | N | Y |
| 555803131 | Stewart, Jasmine R | N | N | N | Y | N | Y |
| 591214549 | Torres, Claudia G | N | N | N | Y | Y | Y |
| 558302186 | Turner, Leora Lasha | N | N | N | Y | N | Y |
| 559005014 | Vega, Shamia | N | N | N | N | Y | Y |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 543604066 | Vera, Ilse Tellez | N | N | N | N | Y | Y |
| 393703007 | Walden, Ty'sheana Timmesha | N | N | N | Y | N | Y |
| 591214144 | Yamada, Maiko Md | N | N | N | Y | Y | Y |
| 559603164 | Zamora, Kimberly S | N | N | N | Y | Y | Y |

Total Number of Graduates: 78 Number of Waivers: 7 Number of CCR: 73

# 2017 Adult High School Grade Calculation
(per 511 IAC 6.3)

8094 Excel Center Lafayette

## Graduation Rate

| | |
|---|---|
| 2016 5 Year Graduation Rate: | 34.9 |
| 2016 4 Year Graduation Rate: | 26.8 |
| 2016 Graduation Rate Improvement: | 8.1 |
| 2017 4 Year Graduation Rate: | 38.05 |
| **Graduation Rate (Improvement + 2017 4 Year Graduation Rate):** | **46.15** |

## Graduation to Enrollment Percentage

| | |
|---|---|
| Number of Students who graduated during 2017 School Year: | 105 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 296 |
| Number of Students under IC 20-24-7-13.5 2017 School Year Period | 304 |
| Average Number of Students under IC 20-24-7-13.5 2017 School Yea | 300 |
| Graduation to Enrollment Percentage: | 35.00 |
| Multiply the Graduation to Enrollment Percentage by 4: | 140.00 |
| **Cap at 100 points (Graduation to Enrollment Percentage):** | **100.00** |

## Graduation Calculation Score

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation to Enrollment Percentage: | 100.00 | 0.9 | 90.00 |
| Graduation Rate: | 46.15 | 0.1 | 4.62 |
| | | | 94.62 |

If the Graduation Qualifying Exam Passing Rate is less than 90%, then multiply by the Graduation Qualifying Exam Passing Rate, otherwise mulitply by 1.

| | | | |
|---|---|---|---|
| Graduation Qualifying Exam Pass Rate: | 94.3% | Mulitply by: | 1.000 |
| | | **Graduation Calculation Score:** | **94.62** |

## College & Career Readiness Score

| | |
|---|---|
| College & Career Achievement Rate: | 91.43 |
| CCR Factor (100/CCR Readiness Target 80%): | 1.25 |
| **College & Career Score (Max 100 points):** | **100.00** |

## Overall Summary

| | Points | Weight | Weighted Points |
|---|---|---|---|
| Graduation Calculation Score: | 94.62 | 0.4 | 37.8 |
| College & Career Readiness Score: | 100.00 | 0.6 | 60.0 |
| | | **Overall Points:** | **97.8** |
| | | **Overall Grade:** | **A** |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 064102061 | Albin, Abigail Lorine | N | N | N | N | Y | Y |
| 804204058 | Alvarez, Alyair | N | N | N | Y | N | Y |
| 804204057 | Alvarez, Yarla Mary | N | N | N | N | Y | Y |
| 800905036 | Amador, Vincent | N | N | N | Y | Y | Y |
| 800905037 | Amador, William | N | N | N | N | Y | Y |
| 809414541 | Araujo Pulido, Jonathan | Y | N | N | Y | N | Y |
| 809414708 | Banes, William T | Y | N | N | Y | N | Y |
| 800503079 | Barbour, Tyler Jacob | N | N | N | Y | Y | Y |
| 803504029 | Belcher, Emily N | N | N | N | N | N | N |
| 295304026 | Bell, Kameron Lloyd | N | N | N | Y | Y | Y |
| 800506094 | Bickett, Makaylin Nicole | N | N | N | N | Y | Y |
| 800505080 | Bolden, Austin Doyle | N | Y | N | Y | N | Y |
| 802105009 | Bosma, Mckenzie Ann | N | Y | N | N | Y | Y |
| 807712003 | Bowling, Veronica Louise | N | N | N | N | Y | Y |
| 802106065 | Bridwell, Brendon Dean | N | Y | N | N | Y | Y |
| 802104077 | Bridwell, Alyssa Nikol | N | N | N | Y | N | Y |
| 064104008 | Brooks, Ulairii Gene | N | N | N | N | N | N |
| 804103029 | Bruce, Samantha Dawn | N | N | N | Y | N | Y |
| 802909027 | Bruchert, Samantha Marie | N | N | N | N | Y | Y |
| 041009001 | Cayton, Alexandra Nicole | N | N | N | Y | N | Y |
| 808905012 | Clark, Courtney Joseph | N | N | N | Y | N | Y |
| 803302136 | Collins, Samantha M | N | N | N | N | Y | Y |
| D45204965 | Combs, Brianna Marie | N | N | N | N | N | N |
| 802404033 | Couts, Cameron | N | N | N | Y | Y | Y |
| 808902291 | Crumly-Shumard, Brittany Leigh | N | N | N | Y | Y | Y |
| 801905018 | Dyer, Ashten Michaela | N | N | N | Y | Y | Y |
| 808505026 | Ezell, Jaila Monet' | N | N | N | N | Y | Y |
| 800503125 | Fitzwater, Kelsey Cymone | N | N | N | Y | N | Y |
| 296106084 | Floyd, Darius Cordell | N | N | N | N | Y | Y |
| 809414795 | Fomicheva, Viktoriya V | N | N | N | Y | Y | Y |
| 802106074 | Fouts, Jacob Riley | N | N | N | Y | N | Y |
| 804506007 | Garrett, Tashawn Tarion | N | N | N | N | N | N |
| 801902464 | Gemberling, Hayden | N | N | N | Y | N | Y |
| 802406041 | Gray, Lynnzey Marie | N | N | N | Y | N | Y |
| 800503043 | Green, Kylie Lynn | N | N | N | N | Y | Y |
| 802106037 | Grove, Megan Elizabeth | N | N | N | N | Y | Y |
| 064902179 | Hall, Alicia Dawn | N | N | N | N | Y | Y |

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# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 807701160 | Hall, Joshua David | N | N | N | Y | N | Y |
| 809414201 | Hall, Martiniana M | N | N | N | Y | N | Y |
| 809414905 | Hampton, Kynetta A | N | N | N | Y | N | Y |
| 808504031 | Hawkins-Taylor, Katheryne Celeste | N | N | N | N | N | N |
| 804205017 | Helmerick, Sapphire Kay | N | N | N | N | Y | Y |
| 809104014 | Hernandez, Ivan | N | N | N | Y | N | Y |
| 807701180 | Horton, Kyle Wayne | N | N | N | N | Y | Y |
| 640505008 | Hudson, James Victor | N | N | N | Y | N | Y |
| 806916069 | Huttenstine, Trevor Alexander | N | N | N | Y | N | Y |
| 251004140 | Jones, Kyle Andrew | N | N | N | N | Y | Y |
| 802106129 | Jones, Sierra Blu | N | N | N | Y | Y | Y |
| 812105020 | Klene, Taleisa Dawn Nichelle | N | N | N | N | N | N |
| 273505016 | Knotts, Hannah Mckenzie | N | N | N | N | Y | Y |
| 681503088 | Lemmon, Dakota Rose | N | N | N | N | N | N |
| 596907053 | Loftus, Mary Jane Claire | N | N | N | N | Y | Y |
| 808505032 | Marchant, Joseph Bryan | N | N | N | Y | Y | Y |
| 808904060 | Marquez, Courtney Leigh | N | N | N | Y | N | Y |
| 064106050 | Maxson, Alexandria N | N | N | N | Y | N | Y |
| 800505067 | Maynard, Logan Marshall | N | N | N | Y | N | Y |
| 100904023 | Mckinney, Kylie Marie | N | N | N | Y | N | Y |
| 809414837 | Meehan, Leslie A | N | N | N | Y | Y | Y |
| 800504050 | Miller, Chelsey Marie | N | N | N | Y | N | Y |
| 811906029 | Miller, Nicole Leann | N | N | N | Y | N | Y |
| 062102464 | Miranda, Ellann Marie | N | N | N | Y | N | Y |
| 810305032 | Murillo, Carlos Alonzo | N | N | N | Y | N | Y |
| 803310003 | Nelson-Renfro, Jermey Marcus | N | N | N | Y | N | Y |
| 809414863 | Nichols, Deniva | N | N | N | Y | N | Y |
| 804511005 | Perez, Nathan Ryan | N | N | N | N | Y | Y |
| 810406045 | Porter, Jesse Damion | N | N | N | Y | N | Y |
| 808904044 | Prewett, Spencer Douglas | N | N | N | N | Y | Y |
| 804209189 | Puentes, Hugo | N | N | N | Y | N | Y |
| 801905092 | Ringstrom, Noah Alexander | N | N | N | Y | N | Y |
| 044102134 | Roberts, Derrick Anthony | Y | N | N | N | Y | Y |
| 804206178 | Rodgers, Mark Lee | N | N | N | N | Y | Y |
| 800706002 | Routsong, Katelin Alise | N | N | N | N | Y | Y |
| D45206243 | Schleppenbach, Alia Anne | N | N | N | N | Y | Y |
| D45206244 | Schleppenbach, Eden Monica | N | N | N | N | Y | Y |

8094 Excel Center Lafayette

# List of 2017 Graduates

| | | Waiver Indicator | AP | IB | IC | DC | CCR |
|---|---|---|---|---|---|---|---|
| 802103037 | Schulze, Stephanie Lyn | N | N | N | Y | Y | Y |
| 808902356 | Sietsma, Morgan Anne | N | N | N | Y | N | Y |
| 809415033 | Silva, Jamie Lynn | Y | N | N | Y | N | Y |
| 800709123 | Simons, James William | N | N | N | Y | N | Y |
| 800504080 | Smith, Anna Marie Petra | N | N | N | N | Y | Y |
| 809414739 | Smith, Montana Rosella | N | N | N | Y | Y | Y |
| 800505114 | Sparger, Megan Lynn | N | N | N | Y | Y | Y |
| 800705034 | Spelbring, Briana K | N | N | N | N | Y | Y |
| 809414815 | Suh, Yiseul | N | N | N | Y | Y | Y |
| 810304046 | Suter, Zachary Adam | N | N | N | Y | N | Y |
| 800904035 | Swank, William | N | N | N | N | Y | Y |
| 800507007 | Tate, Johntonya Chevell | N | N | N | Y | N | Y |
| 809414893 | Thompson, Emma Elizabeth | N | N | N | N | Y | Y |
| 800313006 | Turner, Keosha Chabreial | N | N | N | N | N | N |
| 408604068 | Turner, Desiree Renee | N | N | N | Y | N | Y |
| 408603062 | Turner, Daysha Denise | N | N | N | Y | N | Y |
| 808902063 | Ungersma, Nicholas Isaiah | N | N | N | N | Y | Y |
| 809414806 | Upchurch, Kimiko Marie | N | N | N | Y | Y | Y |
| 801705025 | Vidales, Jenifer Rene | N | N | N | Y | N | Y |
| 806900413 | Walker, Eric Christopher | Y | N | N | Y | Y | Y |
| 293505132 | Walker, Alexis Bryanne | N | N | N | N | N | N |
| 804205036 | Walker-England, Shaylin Nicole | N | N | N | N | Y | Y |
| 802406034 | Wall, Kelsi Nicole | N | N | N | Y | N | Y |
| 800504090 | Walling, Kyrctyn Jade | N | N | N | N | Y | Y |
| 608516013 | Ward, Kelsie Maxine | N | N | N | N | Y | Y |
| 042104480 | Weikel, Kelsie Reva | N | N | N | Y | Y | Y |
| 809414687 | Wellman, Adrianna Elizabeth | N | N | N | Y | N | Y |
| 800706125 | Williams, Clayton Scott | N | N | N | Y | N | Y |
| 809414563 | Wilson, Ashley Dawn | Y | N | N | N | Y | Y |
| 042102424 | Winter, Hannah Rose | N | N | N | Y | N | Y |
| 813510034 | Zheng, Yongxin | N | N | N | N | Y | Y |

Total Number of Graduates: 105 Number of Waivers: 6 Number of CCR: 96