



The Excel Center - Kokomo

Application for Charter Renewal

October 2022

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

Exhibit B

Renewal Application Overview

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

Charter School Name: The Excel Center - Kokomo

Charter School Address: 101 W. Superior Street
Kokomo, IN 46901

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

Mission Statement: See below

School Leader/Principal: Emil Fritsch

Current Board of Directors	
Doris Pryor, Chair	C. Perry Griffith, Jr.
Gita Baker, Vice-Chair	Jay Oliver
Kent Kramer, President & Ex-Oficio	Don Palmer
Dan Riley, Treasurer	Laura Pickett
	Joshua Shelton

Grade Levels and Student Enrollment

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

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

Mission Statement:

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

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

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

Charter School Network:	Excel Centers for Adult Learners
Name of Charter School:	The Excel Center - Kokomo
Designated Representative:	Betsy Delgado
Contact Information:	bdelgado@goodwillindy.org 317-524-4380
Grade Span (Format: "X-X"):	AHS
Maximum Enrollment:	330
Year 1 (Format: "YYYY"):	2023
Initial Approval Date:	

Yearly Enrollment By Grade Level

Grade Level	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>	<u>Maximum</u>
	2023-24	2024-25	2025-26	2026-27	2027-28	
9						
10						
11						
12						
AHS	335	340	340	340	340	340
Total Enrollment (School):	335	340	340	340	340	340

Approved Amendments
(Completed by ICSB)

Approval Date:

Amended Enrollment			
0	0	0	0

Amendment Notes

Proposed Amendment to Enrollment Plan

1. Complete this worksheet only as part of a request to amend your existing Enrollment Plan. Approved amendments will be reflected on your official Enrollment Plan on Sheet 1.
 2. Complete all applicable grey cells. The first seven (7) lines are required.
 3. Amendment requests must fit within the maximum enrollment for the Network as set forth in the State Budget for the appropriate year.

Charter School Network: _____
 Name of Charter School: _____
 Designated Representative: _____
 Contact Information: _____
 Grade Span (Format: "X-X"): _____
 Maximum Enrollment: _____
 Year 1 (Format: "YYYY"): _____

Current Yearly Enrollment By Grade Level
 (Should be the same as the information on Sheet 1)

Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5	Maximum
9						
10						
11						
12						
AHS						
Total Enrollment:	0	0	0	0	0	0

Proposed Yearly Enrollment By Grade Level

Grade Level	Year 1	Year 2	Year 3	Year 4	Year 5	Maximum
9						
10						
11						
12						
AHS						
Total Enrollment:	0	0	0	0	0	0

Executive Summary

Mission and Vision

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

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

History

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

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

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

Community Need

Across the state, there are more than 600,000 Hoosiers over the age of 18 without a high school diploma.¹ Individuals who drop out of high school face a number of challenges that affect their current well-being and future success. High school dropouts have worse health, lower incomes, and fewer job opportunities than the general population.² In addition, high

¹ U.S Census Bureau. American Community Survey, estimates released December 2017.

² Gouskova, E. & Stafford, F. (2005). Trends in household wealth dynamics, 2001-2003. Ann Arbor: Institute for Social Research, University of Michigan. Retrieved from

school dropouts are more likely to be recipients of public assistance and are eight times more likely to be incarcerated than high school graduates.³ The Excel Center has the ability to offer a significant number of Hoosiers an opportunity to improve their educational attainment.

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

Outcomes

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

Despite these challenges, The Excel Center has experienced continued success. Aside from the school years impacted by COVID-19, over the history of The Excel Center the schools have regularly increased both the number of graduates as well as the number of graduates who have achieved postsecondary success. As a result of continued growth in outcomes, these metrics remain at the highest levels of performance.

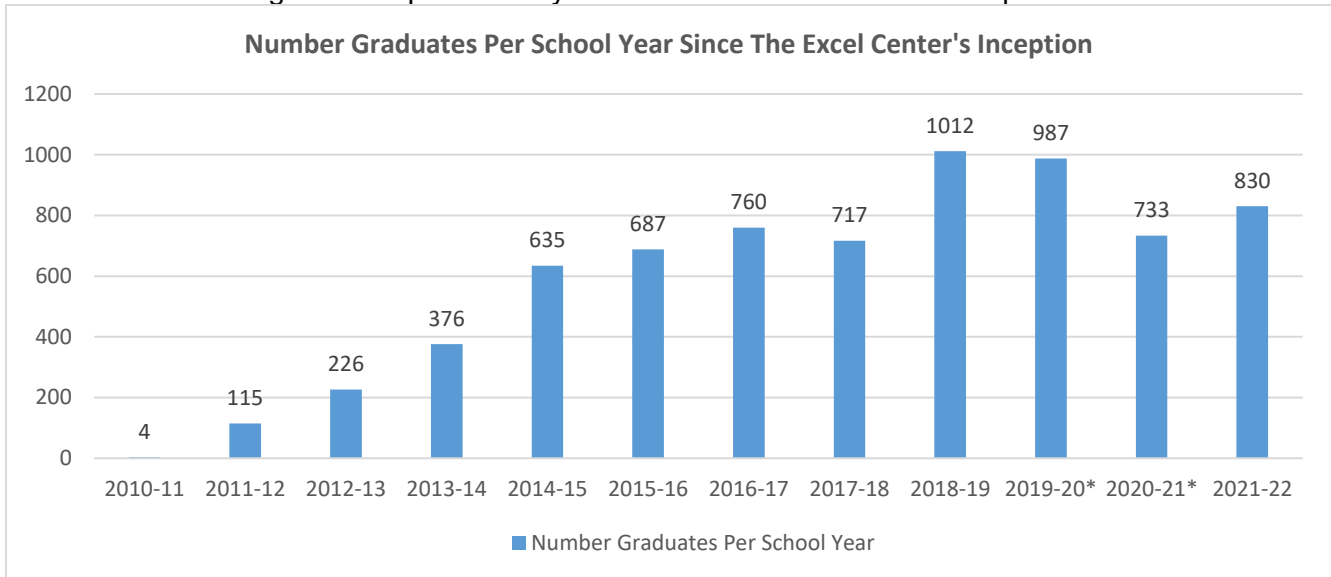
As of June 2022, The Excel Centers operated by GEI have produced over 7,000 graduates. In the most recent school year, 98% of all graduates earned either dual credit or an industry-recognized credential, with many students earning both. (see Chart 1 and Chart 2)

http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03_Trends_in_household_01_03_July_05.pdf

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

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

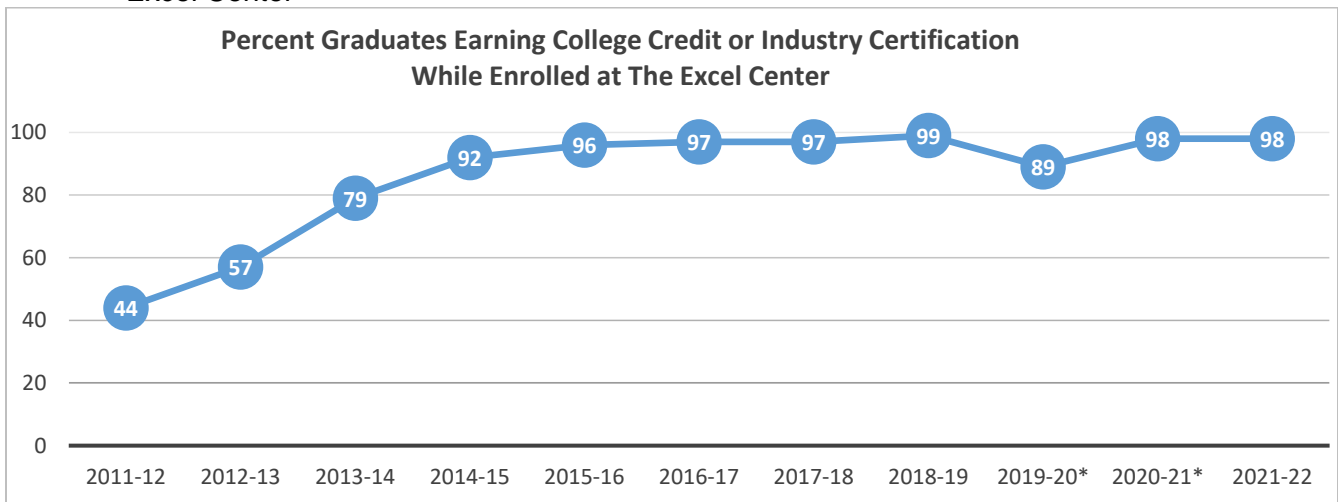
Chart 1. Number of graduates per school year since The Excel Center's inception



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

Aside from the number of graduates completing their diploma during the COVID-19 pandemic, The Excel Center saw a consistent increase in the number of graduates. Throughout The Excel Center's existence, even while numbers of graduates have increased, the schools have maintained high quality graduation requirements, as supported by the percentage of Excel Center graduates leaving school with a dual credit, industry-recognized credential, or both.

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



**Note: SY2019-20 and SY2020-21 were severely disrupted by COVID -19, when all educational opportunities suddenly shifted to virtual instruction in March 2020. Students' ability to earn certifications was impacted when most certification providers were not able to offer certification assessments in a virtual format.*

In its commitment to the success of The Excel Center and its impact on the individuals and communities it serves, over the years GEI has engaged with third-party entities to assess the impact of the work. In 2017, a third-party review of The Excel Center’s impact demonstrated that students’ employment levels and earnings increase significantly as a result of attending the school. After graduation, 70% of students are employed and have a 50% wage increase within 6 months, which confers a wage and re-employment effect premium of \$9,828 per graduate. In addition, a graduate from The Excel Center utilizes significantly less money per year in public spending among public assistance programs, leading to an annual savings of \$793.60 per year per student and a total of \$1,898,291 in annual savings yielded by all graduates of The Excel Center in Indiana.⁵

Most recently, in 2021 GEI engaged with the Laboratory for Economic Opportunity (LEO) through the University of Notre Dame to evaluate outcomes of The Excel Center. This project identified a number of key findings, including:

- Excel Center graduates experience a 40% increase in employment compared to before they enrolled, and a 20% greater workforce participation than their peers.
- Excel center graduates experience a 39% increase in earnings compared to those without a diploma.
- Excel Center graduates outperform their peers who earn a high school equivalency (HSE) in wages by more than 400% annually.
- Excel Center graduate employment and wage benefits are experienced equitably across gender, race, social-economic, and geographical groups.⁶

The Excel Center – Kokomo

Through this charter renewal application, GEI is seeking the full renewal of The Excel Center - Kokomo’s charter. Like all Excel Centers operated by GEI, The Excel Center – Kokomo has a strong history of high quality academic, organizational, and financial performance. The Excel Center – Kokomo proudly serves its community, serving close to 350 students at any given time.

The Excel Center - Kokomo is a valued asset to the community it serves. It has a history of strong performance, having earned an “A” rating on the state’s adult high school accountability system each year since opening. The Excel Center – Kokomo has achieved ‘Exceeds Standard’ on both Adult High School metrics of Graduation Rate and College and Career Readiness and “Meets Standard’ on all Organization & Operations Accountability for all years of the charter.

Even with a number of metrics not measurable as a result of the state of Indiana’s decision to hold schools harmless over the past few years because of COVID-19, the years leading up to that flexibility were marked with ongoing years of strong performance. Since opening in the 2013-14 school year, The Excel Center – Kokomo has celebrated the graduation of 632 students as of the end of the 2021-22 school year. The school continues to make a positive impact in the community.

The results since opening the first Excel Center suggest that Excel Centers are positively impacting the state, the local communities where the schools are located, and the individual

⁵ Center for Evaluation & Education Policy (March 2017). “The Excel Center Research Report”. Indiana University. Bloomington, Indiana.

⁶ Laboratory for Economic Opportunity (2021). “Labor Market Return: Quasi-Control Study (Indiana)”. University of Notre Dame. Notre Dame, Indiana.

lives and families of the students served. The full charter renewal of The Excel Center – Kokomo will continue to uplift students, their families, and the community.

Section I: Performance Review

Successes

The Excel Center – Kokomo has marked a number of successes since first opening its doors for the 2012-13 school year. For each of the school’s nine years of operation, The Excel Center – Kokomo has earned an “A” rating based on Indiana’s adult high school accountability model. The Excel Center – Kokomo takes pride in serving close to 350 students annually and meeting the needs of a diverse group of learners. Per the National Center for Educational Statistics, the national average of students receiving special education services is 15%⁷ and the national average of English learners is 10.4%.⁸ Throughout the last charter cycle, The Excel Center – Kokomo has served a student population with special education needs far exceeding the national average and has continued to help those students graduate and earn post-secondary credentials during their time at The Excel Center - Kokomo. (Table 1)

Table 1

The Excel Center – KOKOMO Enrollment Overview					
	2017-18	2018-19	2019-20	2020-21	2021-22
Average Enrollment	332	329	356	357	347
Special Education	31%	28%	21%	25%	23%
English Learners	7%	7%	4%	6%	5%

**Note: SY2019-20 was severely disrupted by COVID-19, requiring all educational opportunities to suddenly shift to virtual instruction. Students’ ability to earn certifications was impacted when most certification providers were not able to offer certification assessments in a virtual format. SY2020-21 was also impacted, when the school used a hybrid instructional model and the inability to connect with all students face to face affected the school’s ability to connect with students and help remove barriers.*

Because The Excel Center – Kokomo has served its students well, the school has demonstrated a strong adult high school graduation rate. Aside from the 2020-21 school year, which was still significantly impacted by COVID-19, The Excel Center – Kokomo maintained an adult high school graduate rate between 87% and 89% for the duration of this charter renewal. The Excel Center – Kokomo’s College and Career Readiness (CCR) rate has been a strong indicator of graduate quality throughout the school’s history. Throughout the most recent charter the CCR rate was at 94% or above, with the two most recent years at 99% and 100% respectively. (Table 2)

⁷ National Center for Educational Statistics. Students with Disabilities. Retrieved from nces.gov/programs/coe/indicator/cgg/students-with-disabilities

⁸ National Center for Educational Statistics. English learners in public schools. Retrieved from nces.gov/programs/coe/indicator/cgf

Table 2

The Excel Center – KOKOMO					
Graduates, Adult High School Graduation Rate, and CCR Rate					
	2017-18	2018-19	2019-20	2020-21	2021-22
Number Graduates per Year	73	66	77	79	76
Adult High School Graduation Rate	88%	80%	87%	89%	88%
College & Career Readiness Rate	97%	100%	94%	99%	100%

As of the spring of 2021, The Excel Center – Kokomo reached the milestone of helping 632 Hoosiers who had previously left high school to earn their Indiana high school diploma. Of those nearly 632 graduates, on average 98% have left the school earning a dual credit, industry recognized credential, or both.

On the ICSB 5-year Accountability Dashboard, The Excel Center – Kokomo has earned “Exceeds Standard” on both metrics (Graduation and CCR) of the Adult High School Accountability section for all years of the charter. The school has also received “Meets Standard” (the highest level for this section) for each component of the Organizational & Operational Accountability section of the ICSB dashboard in every year of the charter.

Performance Dashboard Summary Measures Not Meeting or Exceeding Standard

In addition to these successes, The Excel Center – Kokomo is committed to addressing items identified within the Indiana Charter School Board (ICSB) Accountability System Dashboard needing improvement.

For the most recent year (2022), The Excel Center – Kokomo will have received a rating of “Meets Standard” for all financial indicators. However, for the two years prior, the school received a rating of “Does Not Meet Standard” in the areas of Cash Flow and Multi-Year Cash Flow.

Because The Excel Center – Kokomo’s operations were consistently cash flow positive, the school was able to invest in the GEI Network at that time (by allowing other schools in the network to borrow funds for start-up), and save for the unknown future by putting money into investment/savings. These activities created the appearance that the school was cash flow negative; however, the funds remained within the GEI network.

Since that time, GEI has assessed a capital recovery charge to most Excel Centers to create a pool of funds with which to fund future capital needs of the network to eventually eliminate the inter-school payables and receivables. Because the additional fee reduced net income, The Excel Center - Kokomo did not quite meet the requirement in the two years it was rated “Does Not Meet Standard.” The ratio has since been factored into capital recovery fees to ensure that each school meets the requirements on a stand-alone basis, which will be reflected in the metrics meeting standard for 2022 (and continuing to do so moving forward).

Section II: Improvement

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

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

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

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

(a) Governing Board

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

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

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

- Monitoring the school’s key performance indicators;
- Establishing policy;
- Approving long-term plans;
- Approving annual plans and budgets;
- Approving any actions that would create or have the potential to create significant obligations for the schools;
- Ensuring financial solvency;
- Assessing its own performance; and
- Taking other actions as necessary to ensure that structures and mechanisms are in

place to maintain GEI's compliance with all applicable laws, regulations, and contracts, including requirements of the schools' charters.

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

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

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

(b) Leadership Team

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

- School Director: Emily Fritsch
- Lead Teacher: Rhea Hendricks
- Lead Coach: Alison Waterman
- College & Career Readiness Specialist: Janet Gall
- Teacher of Record: Kelly Ford and Jennifer Shaw

The school-based leadership team at The Excel Center – Kokomo is also supported by the extended leadership team of GEI, which includes the Senior Vice President, Chief Mission & Education Officer; Vice President, Education Initiatives; Excel Center Regional Directors, and other members of the GEI team.

The school-based leadership team meets on a routine basis to discuss leading and lagging indicators of school performance and to collaborate and communicate frequently for collective problem solving as issues arise. Excel Centers participate in ongoing data reviews to identify best practices and challenges in performance. The school calendar includes embedded professional development days to allow for individual schools to analyze their own data as well as providing an opportunity for cross-network collaboration among Excel Centers to capitalize

on the expertise of the extended network to problem solve. This allows The Excel Center to develop initiatives to continuously improve the school model for the benefit of improving student outcomes.

GEI understands that developing and maintaining effective schools means developing and maintaining strong leaders, and as such, GEI has established various training and professional development models to support The Excel Center network and the staff that brings the model to life. GCSI offers a two-tiered training series aptly named the Leadership Series in order to reflect its intentional focus on leadership development. GEI's other key training series consists of two distinct tracks, allowing activities to best align with the specific needs of the participants as it relates to the various roles within GEI. Although these trainings were paused during COVID-19, GEI is currently discussing these opportunities so that they may be updated and then reinstated to ensure the trainings are still relevant and provide meaningful growth opportunities to participants.

On a monthly basis, Excel Center directors participate in monthly Director Meetings. These meetings provide ongoing training, development, and information as a means of educating and strengthening the knowledge base of Excel Center directors. Similar meetings take place at least 5 times annually (once per Term) for Excel Center leadership team members. This includes monthly professional development for Lead Teachers, Lead Coaches, Special Education Teachers of Record, and English Language Learner Coordinators. These ongoing sessions allow for training and networking, as well as provide a 'train the trainer' model in which these staff members then return to their schools and share the information learned with their site-level team members. This structure reinforces GEI's continuous improvement culture and strengthens individual staff members' skills and the team as a whole.

(c) Teaching staff

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

Lead Teachers also receive support from the GEI Regional Director overseeing curriculum, who can work with schools on specific initiatives and areas a school may wish to target. One of the most recent large-scale projects embarked upon was a full curriculum audit, conducted during the 2021-22 school year. This process involved the evaluation of all Excel Center courses and their corresponding curriculum maps and resources to ensure Indiana Academic Standards were accurately embedded in the courses and content provided sufficient rigor to align with Indiana's Graduation Pathways. Through this process, curriculum maps and related materials were revised and rewritten to provide additional intentionality and create consistent frameworks, regardless of content area.

(d) Academic achievement

The Excel Center has identified three main pillars that are critical to sustaining a high level of student academic achievement: (1) an academic philosophy that meets the goals and needs of adult students, (2) a concentrated focus on College and Career Readiness, and

(3) a coaching platform designed to address the barriers that may impede a student's continued educational success.

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

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

The environment within The Excel Center is designed to meet adults' learning needs by encouraging them to see the relevance and importance of their education while providing a mature environment for learning and discussion. The school is designed to reflect the characteristics and educational environments that benefit adult learners. Complete College America's 2011 report⁹ "Time is the Enemy" highlights how, for many adults in college, an extended period of time to progress through school is a major detriment to their lasting success. Although the report's findings focus on postsecondary education, its lessons about adult learners have been incorporated into the design of The Excel Center. For students who are balancing commute times, family obligations, work, and school, lengthy educational programs with few rewards are a major barrier to ongoing success. The following elements of Complete College America's recommendations have been incorporated into the academic design of The Excel Center:

- *Use of block schedules with fixed and predictable classroom meeting times.* Excel Center classes operate for 90 or 180 minutes each day.
- *Allow students to proceed at a faster pace, with shorter academic terms, less time of between terms, and year-round scheduling.* The Excel Center's year-round calendar takes minimal breaks and operates on five terms lasting 8 weeks each.
- *Simplify the registration process.* Students enroll in one coherent program during student orientation and receive substantial help from life coaches, teachers, and other staff to understand their path to earn a high school diploma and an industry-recognized credential and/or college credits.
- *Form peer support and learning networks.* Students build relationships with other students and teachers in The Excel Center's small school environment. Additionally, life coaches work to ensure students remain engaged in the school's academic program and feel connected to, and that they belong, in the school.
- *Embed remediation into the regular educational design so that students don't waste time before they start earning credits.* The Excel Center has established a learning environment that meets adults where they are academically. Students participate in fixed-time classes where they cover key academic subjects in language arts, mathematics, social studies, and science. These courses are designed to build skills, teach material, and engage with students. Many students come to The Excel Center requiring significant remediation and special supports. For these students, reading, math, and basic skills labs allow them to learn critical information when they need it.

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

Foundational courses allow students to earn elective credit, helping students connect their remedial work to the goal of earning credits toward their high school diplomas.

The Excel Center's focus on College and Career Readiness prepares students to learn the general skills necessary to become successful in the workplace. The Partnership for 21st Century Learning developed a framework that identified many of the critical competencies and skills essential to students preparing to enter the workforce in the 21st century.¹⁰ These skills are grouped into four general categories:

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

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

Many individuals who have dropped out of school will re-enter the educational system when they find that there are few employment opportunities available for individuals who lack a high school diploma. To respond to this demand, The Excel Center's coursework and learning environment enable students to access greater career opportunities. As our students are adults and often focused on "what comes next" after their diploma, this has always been a key element of The Excel Center model and something Excel Centers have implemented long before Indiana's transition to the Graduation Pathways.

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

The Excel Center's coaching platform addresses the life barriers and issues that may prevent students from meeting their goals and achieving academic success. The Excel Center's life coaches are responsible for keeping students engaged and motivated in the school. The relationship that coaches create with each student is a critical factor in student success as that relationship provides security, confidence, and encouragement for students

¹⁰ Partnership for 21st Century Learning. Framework for 21st Century Learning. Retrieved from <http://www.battleforkids.org/networks/p21/frameworks-resources>

to continue at times when the school work becomes difficult and life barriers become challenging to manage. Life coaches work with students to identify potential barriers to students' continued education, whether short-term (such as housing, transportation, and childcare) or long-term (including self-sufficiency and mental health). The coach is responsible for student advocacy, barrier removal, community partnerships, and academic counseling and plays a significant role in helping the student achieve their short- and long-term goals.

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

As a result of COVID-19, The Excel Center – Kokomo was forced to change a number of services and practices in order continue serving students in a virtual, and later hybrid, setting. Although this abrupt change was challenging at the time, it resulted in some beneficial and now-adopted changes in practice.

Barrier Removal: Mental Health Services

Since returning to in-person instruction full time, students at The Excel Center – Kokomo have been adjusting to life in school and in the classroom. Students have demonstrated and increased need for mental health care and support in strategies to effectively address interpersonal conflicts. These increased needs have been especially noteworthy at the school in students who aren't yet fully adults but who society would expect to demonstrate more maturity.

As a result, The Excel Center – Kokomo has leaned heavily into its four-county counseling partnership, which started just prior to COVID-19. This partnership originated as school-based services for students, but based on need has evolved to an in-building skills trainer. The skills trainer comes to the school two to three days per week and provides support to students around coping skills and healthy ways to channel strong emotions. The skills trainer has been a valued partner at the school, as they are specifically trained in these areas and able to provide these services at a more in-depth level than the school's life coaches.

Ivy Tech Partnership

The Excel Center – Kokomo has long valued its partnership with Ivy Tech, and since COVID-19 the relationship has become even more intentional. Through a shared vision, The Excel Center – Kokomo students have begun attending classes on Ivy Tech's campus as part of their educational program. By engaging in this shared model, students attend classes at both The Excel center – Kokomo and Ivy Tech, which helps them to see themselves as college students and have a positive post-secondary experience while working on their diploma.

The Excel Center – Kokomo has been intentional with the structure of this option, creating Ivy Tech four days prior to Excel Center students starting their first class on the Ivy Tech campus. The Excel Center College and Career Readiness Specialist maintains ongoing community with the Ivy Tech instructors with a goal to scaffold student support so that as they graduate and pursue post-secondary education, the students will already have developed the skills necessary to be successful.

In addition to the Ivy Tech partnership, The Excel Center – Kokomo has broadened opportunities available for students specific to career pathways. The school has been thoughtful in expanding Graduation Pathways to include expanded options for employment and post-secondary opportunities. This also has come out of a desire to ensure students have more choices, as well as engagement with the school while planning for their next step after graduating.

Community Advisory Team (CAT)

As was the case across the country, the Kokomo community experienced significant transition in its community organizations and businesses as a result of COVID-19. While this didn't change the entities that The Excel Center – Kokomo partnered with, it did change the people involved in the work. The school and local businesses and organizations continued to engage with each other; however, the work wasn't as focused as during COVID-19, as everyone was figuring out how to navigate such uncertain times.

With all of the transitions among partners, The Excel Center – Kokomo has maximized this as an opportunity to re-forge relationships within the community, almost as if the school were just opening. The CAT is similar in this regard, in that two new members have just been added. One of the new members is a local pastor who is interested in helping the school make employer connections. The second new member is a retired National Guard member who would like to volunteer at the school and potentially contract with the school to provide certifications.

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

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

Section III: Proposed Changes to Charter Agreement

None

Instructions for Renewal Budget Projections Workbook

= Information should be entered into light gray shaded cells.

Name of Charter School: **KOKOMO EXCEL CENTER**

Location: **Kokomo-Center Twp Con Sch Corp**

First Year of New Charter (Renewal Year): **2023 - 24 SY**

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

School Enrollment Projections

(must align with Renewal Application Enrollment Plan)

School Name: **KOKOMO EXCEL CENTER**
 Location: **Kokomo-Center Twp Con Sch Corp**
 Renewal Year: **2023 - 24 SY**

Is the school an Adult High School (please see instructions): **Yes**

Complete Rows 32 and 37-40 only.

Enrollment	Current Year	Year 1	Year 2	Year 3	Year 4	Year 5	Notes & Instructions
	2022 - 23 SY	2023 - 24 SY	2024 - 25 SY	2025 - 26 SY	2026 - 27 SY	2027 - 28 SY	
Kindergarten							<p>Please complete the enrollment table for the school's current year, and provide enrollment projections for the next five (5) years beginning with the Renewal Year.</p> <p>1) An "adult high school" is a charter school that has a majority of enrolled students that: (1) belong to a graduation cohort that has already graduated; or (2) are over the age of eighteen (18) years of age; at the time the student was first enrolled at the school. <u>If you are an adult high school, complete Rows 32, and 37-40 only.</u></p> <p>2) A "virtual student" is defined as a student for whom at least fifty percent (50%) of the instructional services received from the school is virtual instruction. Virtual instruction means instruction that is provided in an interactive learning environment created through technology in which students are separated from their teacher by time or space, or both. Students receiving more than 50% of their instruction virtually generate eighty-five percent (85%) of the foundation formula amount rather than 100%. The analysis is applicable on a per student basis.</p> <p>3) The "basic" tuition support grant for K-12 schools is equal to the following formula: (Foundation Amount X ADM) + ((Complexity Multiplier X Complexity Index) X ADM)</p> <p>The Distribution calculations are an estimate based on projected enrollment multiplied by basic tuition support in the amounts as set forth in the most recently passed (2021-23 FY) budget- Foundation = \$5,995 for the 2021-22 SY and \$6,235 for the 2022-23 SY (and beyond) and Complexity Multiplier = \$3,775. The school's actual distribution will be based on the school's ADM count of eligible pupils enrolled in the school on two count dates (in September and February) multiplied by the basic tuition support calculation. The calculation uses the Complexity Index for the school corporation in which the proposed charter school will be located- the school's actual Complexity Index amount will likely differ. The Special Education Grant amount is calculated on Tab 4 and uses the grant amount for mild/moderate disabilities (\$2,657 for the 2022-23 SY). The grant amount for severe disabilities is \$10,575 for the 2022-23 SY).</p> <p>4) The Adult Learner Grant amount for adult high schools is \$6,750. The Adult Distribution is calculated by multiplying Total Enrollment by the Adult Grant.</p>
Grade 1							
Grade 2							
Grade 3							
Grade 4							
Grade 5							
Grade 6							
Grade 7							
Grade 8							
Grade 9							
Grade 10							
Grade 11							
Grade 12							
Total K-12 Enrollment:	0	0	0	0	0	0	
Adult Learners (1)	335	340	340	340	340	340	
Total Adult Enrollment:	335	340	340	340	340	340	
Estimated % of Students:							
Special Education	25%	25%	25%	25%	25%	25%	
English Learners	6%	6%	6%	6%	6%	6%	
Free/Reduced Priced Lunch	73%	73%	73%	73%	73%	73%	
Virtual Students (2)	0%	0%	0%	0%	0%	0%	
K-12 Distribution (3)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Adult Distribution (4)	\$ 2,261,250.00	\$ 2,295,000.00	\$ 2,295,000.00	\$ 2,295,000.00	\$ 2,295,000.00	\$ 2,295,000.00	

5-Year Projected Staffing Plan

School Name: **KONOMO EXCEL CENTER**
 Renewal Year: **2023 - 24 5Y**

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

- Complete all relevant Grey Shaded areas -> Name of Position, Number of Positions, Average Salary, Health Insurance, Retirement Contribution, and Other Benefits.
- Projected salary and benefits should align with Year 0 and 5-Year budgets.
- Please see footnotes below for additional information before completing the worksheet.

	Current Year			Year 1			Year 2			Year 3			Year 4			Year 5		
	Number	Average Salary (\$)	Total Expense	Number	Average Salary	Total Expense	Number	Average Salary	Total Expense	Number	Average Salary	Total Expense	Number	Average Salary	Total Expense	Number	Average Salary	Total Expense
INSTRUCTIONAL STAFF																		
Lead Instructor	1.0	\$ 57,573.04	\$ 57,573.04	1.0	\$ 59,300.23	\$ 59,300.23	1.0	\$ 61,079.24	\$ 61,079.24	1.0	\$ 62,911.62	\$ 62,911.62	1.0	\$ 64,798.96	\$ 64,798.96	1.0	\$ 66,742.93	\$ 66,742.93
Humanities Instructor	1.0	\$ 52,673.04	\$ 52,673.04	1.0	\$ 54,253.23	\$ 54,253.23	1.0	\$ 55,880.83	\$ 55,880.83	1.0	\$ 57,557.25	\$ 57,557.25	1.0	\$ 59,283.97	\$ 59,283.97	1.0	\$ 61,062.49	\$ 61,062.49
Math Instructor	1.0	\$ 48,508.04	\$ 48,508.04	1.0	\$ 49,963.28	\$ 49,963.28	1.0	\$ 51,462.18	\$ 51,462.18	1.0	\$ 53,006.05	\$ 53,006.05	1.0	\$ 54,596.23	\$ 54,596.23	1.0	\$ 56,234.11	\$ 56,234.11
Resource Instructor	1.0	\$ 53,163.04	\$ 53,163.04	1.0	\$ 54,757.93	\$ 54,757.93	1.0	\$ 56,400.67	\$ 56,400.67	1.0	\$ 58,092.69	\$ 58,092.69	1.0	\$ 59,835.47	\$ 59,835.47	1.0	\$ 61,630.53	\$ 61,630.53
Special Education Instructor	1.0	\$ 48,998.04	\$ 48,998.04	1.0	\$ 50,467.98	\$ 50,467.98	1.0	\$ 51,982.02	\$ 51,982.02	1.0	\$ 53,541.48	\$ 53,541.48	1.0	\$ 55,147.73	\$ 55,147.73	1.0	\$ 56,802.16	\$ 56,802.16
Humanities Instructor, Nights Evenings	1.0	\$ 52,673.04	\$ 52,673.04	1.0	\$ 54,253.23	\$ 54,253.23	1.0	\$ 55,880.83	\$ 55,880.83	1.0	\$ 57,557.25	\$ 57,557.25	1.0	\$ 59,283.97	\$ 59,283.97	1.0	\$ 61,062.49	\$ 61,062.49
Resource Instructor	1.0	\$ 52,673.04	\$ 52,673.04	1.0	\$ 54,253.23	\$ 54,253.23	1.0	\$ 55,880.83	\$ 55,880.83	1.0	\$ 57,557.25	\$ 57,557.25	1.0	\$ 59,283.97	\$ 59,283.97	1.0	\$ 61,062.49	\$ 61,062.49
Special Education Instructor	1.0	\$ 49,895.72	\$ 49,895.72	1.0	\$ 51,392.59	\$ 51,392.59	1.0	\$ 52,934.37	\$ 52,934.37	1.0	\$ 54,522.40	\$ 54,522.40	1.0	\$ 56,158.07	\$ 56,158.07	1.0	\$ 57,842.81	\$ 57,842.81
Evening Course Stipends	1.0	\$ 53,653.04	\$ 53,653.04	1.0	\$ 55,262.63	\$ 55,262.63	1.0	\$ 56,920.51	\$ 56,920.51	1.0	\$ 58,628.13	\$ 58,628.13	1.0	\$ 60,386.97	\$ 60,386.97	1.0	\$ 62,198.58	\$ 62,198.58
Tutor	1.0	\$ 56,364.68	\$ 56,364.68	1.0	\$ 58,055.62	\$ 58,055.62	1.0	\$ 59,797.29	\$ 59,797.29	1.0	\$ 61,591.21	\$ 61,591.21	1.0	\$ 63,438.95	\$ 63,438.95	1.0	\$ 65,342.12	\$ 65,342.12
Instructional Interventionalist	1.0	\$ 39,000.00	\$ 39,000.00	1.0	\$ 40,170.00	\$ 40,170.00	1.0	\$ 41,375.10	\$ 41,375.10	1.0	\$ 42,616.35	\$ 42,616.35	1.0	\$ 43,894.84	\$ 43,894.84	1.0	\$ 45,211.69	\$ 45,211.69
	1.0	\$ 21,625.39	\$ 21,625.39	1.0	\$ 22,274.15	\$ 22,274.15	1.0	\$ 22,974.15	\$ 22,974.15	1.0	\$ 23,724.15	\$ 23,724.15	1.0	\$ 24,524.15	\$ 24,524.15	1.0	\$ 25,374.15	\$ 25,374.15
	1.0	\$ 31,493.28	\$ 31,493.28	1.0	\$ 32,438.08	\$ 32,438.08	1.0	\$ 33,411.22	\$ 33,411.22	1.0	\$ 34,413.56	\$ 34,413.56	1.0	\$ 35,445.96	\$ 35,445.96	1.0	\$ 36,509.34	\$ 36,509.34
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Instructional Staff:	13.0		\$ 618,293.39	13.0		\$ 636,842.18	12.0		\$ 633,005.09	12.0		\$ 651,995.24	12.0		\$ 671,555.09	12.0		\$ 691,703.74
ADMIN & SUPPORT																		
School Director	1.0	\$ 86,101.43	\$ 86,101.43	1.0	\$ 88,684.47	\$ 88,684.47	1.0	\$ 91,345.00	\$ 91,345.00	1.0	\$ 94,085.35	\$ 94,085.35	1.0	\$ 96,907.92	\$ 96,907.92	1.0	\$ 99,815.15	\$ 99,815.15
Manager, Office Administration	1.0	\$ 41,627.18	\$ 41,627.18	1.0	\$ 42,875.99	\$ 42,875.99	1.0	\$ 44,162.27	\$ 44,162.27	1.0	\$ 45,487.14	\$ 45,487.14	1.0	\$ 46,851.75	\$ 46,851.75	1.0	\$ 48,257.31	\$ 48,257.31
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Lead Coach	1.0	\$ 49,831.05	\$ 49,831.05	1.0	\$ 51,325.98	\$ 51,325.98	1.0	\$ 52,865.76	\$ 52,865.76	1.0	\$ 54,451.73	\$ 54,451.73	1.0	\$ 56,085.28	\$ 56,085.28	1.0	\$ 57,767.84	\$ 57,767.84
College and Career Readiness Specialist	1.0	\$ 50,101.51	\$ 50,101.51	1.0	\$ 51,604.56	\$ 51,604.56	1.0	\$ 53,152.69	\$ 53,152.69	1.0	\$ 54,747.27	\$ 54,747.27	1.0	\$ 56,389.69	\$ 56,389.69	1.0	\$ 58,081.38	\$ 58,081.38
Coach	1.0	\$ 45,456.33	\$ 45,456.33	1.0	\$ 46,820.02	\$ 46,820.02	1.0	\$ 48,224.62	\$ 48,224.62	1.0	\$ 49,671.35	\$ 49,671.35	1.0	\$ 51,161.50	\$ 51,161.50	1.0	\$ 52,696.34	\$ 52,696.34
Coach	1.0	\$ 42,394.80	\$ 42,394.80	1.0	\$ 43,666.64	\$ 43,666.64	1.0	\$ 44,976.64	\$ 44,976.64	1.0	\$ 46,325.94	\$ 46,325.94	1.0	\$ 47,715.72	\$ 47,715.72	1.0	\$ 49,147.19	\$ 49,147.19
Coach	1.0	\$ 45,952.62	\$ 45,952.62	1.0	\$ 47,331.20	\$ 47,331.20	1.0	\$ 48,751.14	\$ 48,751.14	1.0	\$ 50,213.67	\$ 50,213.67	1.0	\$ 51,720.08	\$ 51,720.08	1.0	\$ 53,271.68	\$ 53,271.68
Drop-in Center Manager	1.0	\$ 44,997.97	\$ 44,997.97	1.0	\$ 46,532.91	\$ 46,532.91	1.0	\$ 47,207.89	\$ 47,207.89	1.0	\$ 48,624.13	\$ 48,624.13	1.0	\$ 50,082.86	\$ 50,082.86	1.0	\$ 51,585.34	\$ 51,585.34
Drop-in Center Attendant	1.0	\$ 34,646.00	\$ 34,646.00	1.0	\$ 35,685.38	\$ 35,685.38	1.0	\$ 36,755.94	\$ 36,755.94	1.0	\$ 37,858.62	\$ 37,858.62	1.0	\$ 38,994.38	\$ 38,994.38	1.0	\$ 40,164.21	\$ 40,164.21
Drop-in Center Attendant	1.0	\$ 24,460.80	\$ 24,460.80	1.0	\$ 25,194.62	\$ 25,194.62	1.0	\$ 25,950.46	\$ 25,950.46	1.0	\$ 26,728.98	\$ 26,728.98	1.0	\$ 27,530.85	\$ 27,530.85	1.0	\$ 28,356.77	\$ 28,356.77
Drop-in Center Attendant	1.0	\$ 24,460.80	\$ 24,460.80	1.0	\$ 25,194.62	\$ 25,194.62	1.0	\$ 25,950.46	\$ 25,950.46	1.0	\$ 26,728.98	\$ 26,728.98	1.0	\$ 27,530.85	\$ 27,530.85	1.0	\$ 28,356.77	\$ 28,356.77
Custodian	1.0	\$ 25,950.46	\$ 25,950.46	1.0	\$ 26,728.97	\$ 26,728.97	1.0	\$ 27,530.84	\$ 27,530.84	1.0	\$ 28,356.77	\$ 28,356.77	1.0	\$ 29,207.47	\$ 29,207.47	1.0	\$ 30,083.69	\$ 30,083.69
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Admin & Support Staff:	12.0		\$ 515,480.95	12.0		\$ 530,945.36	12.0		\$ 546,873.71	12.0		\$ 563,279.93	12.0		\$ 580,178.35	12.0		\$ 597,583.67
		Rate/Per Employee Expense	Total Expense		Rate/Per Employee Expense	Total Expense		Rate/Per Employee Expense	Total Expense		Rate/Per Employee Expense	Total Expense		Rate/Per Employee Expense	Total Expense		Rate/Per Employee Expense	Total Expense
BENEFITS																		
Health Insurance (2)		\$ 7,369.50	\$ 184,237.50		\$ 7,589.83	\$ 189,745.75		\$ 7,969.32	\$ 191,263.68		\$ 8,208.40	\$ 197,001.60		\$ 8,454.65	\$ 202,911.60		\$ 8,708.29	\$ 208,998.96
Retirement Contributions (3)		\$ 3,401.32	\$ 85,033.00		\$ 3,503.36	\$ 87,584.00		\$ 3,758.81	\$ 90,211.44		\$ 3,871.58	\$ 92,917.92		\$ 3,987.72	\$ 95,705.28		\$ 4,107.36	\$ 98,576.64
Social Security		6.2%	\$ 70,294.01		6.2%	\$ 72,402.83		6.2%	\$ 73,152.49		6.2%	\$ 75,347.06		6.2%	\$ 77,607.47		6.2%	\$ 79,935.70
Medicare		1.45%	\$ 16,439.73		1.45%	\$ 16,932.92		1.45%	\$ 17,108.24		1.45%	\$ 17,621.49		1.45%	\$ 18,150.13		1.45%	\$ 18,694.64
Unemployment		2.5%	\$ 28,344.36		2.5%	\$ 29,194.69		2.5%	\$ 29,496.97		2.5%	\$ 30,381.88		2.5%	\$ 31,293.34		2.5%	\$ 32,232.14
Other Compensation (4)		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -		\$ -	\$ -

SUMMARY	Current Year			Year 1			Year 2			Year 3			Year 4			Year 5		
	Total Staff	Total Salaries	Total Benefits	Total Staff	Total Salaries	Total Benefits	Total Staff	Total Salaries	Total Benefits	Total Staff	Total Salaries	Total Benefits	Total Staff	Total Salaries	Total Benefits	Total Staff	Total Salaries	Total Benefits
	25.0	\$ 1,133,774.34	\$ 384,348.60	25.0	\$ 1,167,787.54	\$ 395,860.19	24.0	\$ 1,179,878.80	\$ 401,232.82	24.0	\$ 1,215,275.17	\$ 413,269.95	24.0	\$ 1,251,733.44	\$ 425,667.82	24.0	\$ 1,289,285.41	\$ 438,438.07
		\$ 1,518,122.94	\$ 1,518,122.94		\$ 1,563,647.73	\$ 1,563,647.73		\$ 1,581,113.62	\$ 1,581,113.62		\$ 1,628,545.12	\$ 1,628,545.12		\$ 1,677,401.26	\$ 1,677,401.26		\$ 1,727,723.48	\$ 1,727,723.48
	26:1		26:1	26:1		26:1	28:1		28:1	28:1		28:1	28:1		28:1	28:1		28:1
	28:1		28:1	28:1		28:1	28:1		28:1	28:1		28:1	28:1		28:1	28:1		28:1

Footnotes:

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

Payments made to "independent contractors" should be listed as "Other Compensation" on Row 58, and explained in the budget narrative. Do not include payments made to independent contractors on Rows 15-47.

- (1) Amounts paid to "employees" regardless of whether they are full-time, part-time, or limited-time should be listed in the **Average Salary** column (Rows 15-47) for each year. All pay provided to an employee for services performed should be included, including salaries, vacation allowances, bonuses, stipends, commissions, and taxable fringe benefits. For more information, see <https://www.irs.gov/publications/p15>.
- (2) **Health Insurance** includes Group Life Insurance, Group Health Insurance, Group Accident Insurance, Other Authorized Group Insurance, and Workers Compensation Insurance.
- (3) **Retirement Contributions** includes Severance/Early Retirement Pay, Public Employees Retirement Fund, Teachers Retirement Fund, Public Employees Retirement Fund (Optional Contribution), Teacher Retirement Fund (Optional Contribution).
- (4) **Other Compensation** - includes any other benefits not otherwise classified above, including payments made to independent contractors. This cell should reflect the sum total of all Other Compensation for the year.

The Excel Center – Kokomo
Budget Narrative

State Funding:

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

Federal Funding:

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

Other Revenue:

Budgeted Other Revenue represents the expected E-Rate Reimbursement for internet. Effective with the purchase of the Kokomo Excel building by GEI in September 2022, the rent will be in-kind and is reflected at the current market rate.

Inflation:

While certain expenses are likely to increase annually due to inflation. The budget model is using fairly flat expenses (increases of 1-2%) through the 5-year period except for salary and wage cost which were assumed to increase 3% per year.

Salaries/Wages:

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

Instructional Supplies and Resources:

Prior year actual and current year budget were used to develop the 5-year projection, assuming a 1-2% increase in most areas. Expenses, such as internet, were budgeted at full cost rather than the discounted e-rate expense, and the expected reimbursement was recorded in Other Income.

Support Supplies:

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

Professional or Contracted Services:

The annual financial audit as well as insurance and contracted security were all projected with slight increases over the 5-year term. All other elements were increased by 1-2%.

Facilities Expense:

The rental rate to our landlord (Goodwill Education Initiatives, as of September 2022) is expected to remain flat over this projection and will be in-kind as noted above.

Depreciation is planned to remain flat until the 3rd year of the projection anticipating a refresh of the facility if funds are available to be granted from GEI.

Other Expenses:

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

Other Financial Considerations, Depending on Potential State Funding Changes:

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

Exhibit C

Statement of Assurances

The charter school agrees to comply with the following provisions: (*Read and check*)


- 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.
- 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by ICSB and IDOE. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- 7. Recipients will comply with all provisions of the *Elementary and Secondary Education Act of 1965, as amended by the Every Student Succeeds Act of 2015 ("ESSA")*, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act ("FERPA") and assessments.
- 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.
- 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.

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

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

Betsy Delgado

Name



Signature

10/18/2022

Date