Charter Application Overview - Experienced Operator

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

Name of proposed Charter School: PLA Pike

Proposed Charter School location:*   Pike Township, Indiana

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: MSD Pike Township

Legal name of group applying for Charter: Phalen Leadership Academies

Designated representative: Johnny Jin

Contact Information (Phone & Email):
Phone: (818) 825-4407
Email: jjin@phalenacademies.org

Planned opening year for the school: SY 2023-2024

Model or focus of proposed school:
(e.g., arts, college prep, dual-language, etc.)   Phalen Leadership Academies educational model

Proposed 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.

Target student population (if any):   Children from underserved communities

Has or will an application for the same charter school be submitted to another authorizer either concurrently or in the near future?

Yes ☐   No ☒

If yes, identify the authorizer(s):   N/A

Planned submission date(s):   N/A

List the number of previous submissions (including withdrawn submissions) for request to authorize any charter school(s) over the past five years, as required under IC § 20-24-3-4.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

School	Authorizer	Submission Date
James & Rosemary Phalen Leadership Academy Middle School (JRP-MS)	ICSB	03/10/2017
PLA@George H. Fisher School #93 (PLA@93)	ICSB	09/10/2018
PLA@Francis Scott Key School #103 (PLA@103	ICSB	10/28/2019
PLA@Louis B. Russell Jr. School #48 (PLA@48)	ICSB	04/09/2020
James & Rosemary Phalen Leadership Academy High School (JRP-HS)	ICSB	11/04/2019
Phalen Virtual Leadership Academy (PLA Virtual)	Trine Education One	05/19/2020
PLA Elkhart 1	ICSB	08/31/2021
PLA Elkhart 2	Trine Education One	05/06/2022

Additional Information Required for Experienced Operators

Does the school expect to contract or partner with an ESP or other organization for Charter School management/operation?

Yes ☐   No ☒

If yes, identify the ESP or partner organization.

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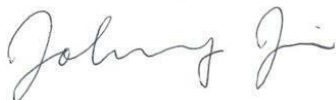
Yes ☒   No ☐

If yes, provide the name and location of at least one school where the model is in use.

George and Veronica Phalen Leadership Academy, 2323 North Illinois Street, Indianapolis, IN 46202

Signature of Designated Representative

Name Johnny Jin

Signature *Johnny Jin*   **Date** September 13, 2022

Charter Activation Request Application
Revised June 2021
Updated June 2022

An organizer who has been granted multiple charters by the Indiana Charter School Board ("ICSB") may request to "activate" an unused charter by submitting a formal request, signed by the organizer's Board chair, to ICSB's Executive Director. The request, including all attachments, must be submitted electronically to indianacharterschoolboard@icsb.in.gov.

The request must include the following information:

> **Please note that, absent special circumstances, ICSB will not approve a school to open in the same year that a request is submitted (e.g., a request submitted in the Spring Application for a school to open in Fall of the same year). If a school wishes to request an expedited opening, the applicant must include, where relevant, information demonstrating how the school will be ready to open in the Fall, including, but not limited to, the impact on facility, staffing, enrollment, community engagement, and any other aspects of an expedited start-up.**

[Please limit your request to 30 total pages excluding (1), (2), (3), (4), (6) and (9)]

1. A resolution from the governing board of the organizer approving the activation;

Please see attached.

2. A completed Budget and Staffing Workbook;

Please see attached.

3. The last three years of consolidated audited financial statements and management letters for the organizer including all schools operated by the organizer within Indiana);

Please see attached.

4. A detailed budget narrative that describes assumptions and revenue estimates, including but not limited to the basis for per-pupil revenue projections, staffing levels, facilities expenses, and technology costs. The narrative should specifically address:
>   a. **The degree to which the school (and network) budget relies on variable income (e.g., grants, donations, fundraising).**
>   b. **The school's contingency plans to meet financial needs if anticipated revenues at the proposed school or network are not received or are lower than the estimated budget.**

c. **How the school will ensure it has sufficient funds to cover all anticipated expenses, including but not limited to: (a) startup costs, (b) special population subgroup costs, (c) transportation costs necessary to ensure the school will be accessible for all enrolled students, and (d) required retirement plan contributions.**
d. **The impact on the network (if one exists) of opening an additional school.**

At both the school and network level, we utilize a financially sustainable model that will empower our school to implement the evidence-based PLA educational model with fidelity, while remaining financially healthy over time:

i. Campus-Level Budget Narrative
Please find below a high-level summary of the campus-level budget, including key assumptions and revenue estimates:
- The budget is a conservative view of enrollment, revenue and expenses to ensure that the school is sustainable on State and Federal funds.
- We would expect to be able to grow relatively rapidly over the first few years, by adding grade levels each year. We will utilize marketing efforts in the area to help increase enrollment and build a pipeline of scholars.
- State basic funding is also conservatively projected at the values generated by the budget model.
- Staffing is based on current average salaries and benefits plus an allowance for 3% annual increases.
- Staff ratios are based on 25 scholars per class.
- Facility lease costs are based on average lease expenses currently at similar schools.
- All expenses are aligned to funding available based on annual enrollment.
- Competitive grants are included for years 0-2 and philanthropy is only included in year 0, for initial startup costs.

5 Year Budget - Key Assumptions:	FY24	FY25	FY26	FY27	FY28
Enrollment	228	346	464	604	698
Annual Enrollment Growth	-	52%	34%	30%	16%
Average Basic State Funding Per Scholar	6,797	6,797	6,797	6,797	6,797
Average Other State Funding Per Scholar	1,674	1,674	1,674	1,674	1,674
Federal Funding Per Scholar (excl Nutrition)	1,200	1,200	1,200	1,200	1,100
Avg Nutrition per Scholar	900	900	900	900	900
Comp. Gr & Philanthropy per Scholar	1,316	867	-	-	-
Other Rev per Scholar	-	-	-	-	-
Total Funding Per Scholar	11,886	11,437	10,570	10,570	10,470
Total Full Time Staff (FTE)	19.0	33.0	42.0	52.0	58.0
Annual Salary Increase	-	3.0%	3.0%	3.0%	3.0%
Facility Lease	300,000	330,000	363,000	399,300	439,230
Total Expenses per Scholar	11,868	11,423	10,556	10,556	10,453
Net Surplus	4,155	4,952	6,739	8,502	11,850

In addition to our conservative budgeting practices, we have a strong data-driven framework of systems and processes to support healthy enrollment at the school. This includes:

- Student recruitment and enrollment: We will leverage the success PLA has had across its schools, working in predominantly economically disadvantaged communities, to deploy recruitment strategies that meet the needs of our specific communities. PLA is focused on providing exceptional educational options to families who otherwise might not have access to them. This includes building relationships

with families living in poverty; families with language barriers; students who are struggling academically; students with disabilities; and other youth at risk of academic failure. Our marketing and communications efforts work to break through information barriers that traditionally prevent parents and families from accessing high quality educational opportunities.

- Implementing a robust student recruitment plan: Our holistic student recruitment plan a) leverages lessons learned from previous network-wide enrollment campaigns to set targets; b) provides clearly delineated roles and responsibilities for key staff involved in the implementation of the student recruitment plan; c) includes a year-round calendar with engagement activities to support key student recruitment phases such as early interest, lottery, late rush and churn; and d) provides updated communication collateral that can be used effectively to reach and authentically engage with a variety of families.
- Data-driven student recruitment system: Across its schools, PLA has employed the student recruitment system SchoolMint to provide staff with an online hub to empower data-driven decision-making in the recruitment and retention process. Leveraging automated, multilingual mobile capabilities, SchoolMint will help PLA schools in streamlining the recruitment process while equitably reaching a broad array of interested families. With predictive and real-time enrollment statistics, this system allows us to implement strategic enrollment plans by setting and reaching KPIs through accurate, data-driven forecasting.
- Evidence-based family engagement: Leveraging PLA's scientifically proven family engagement model, the proposed schools will host community events that provide a more comprehensive view of our school, including the admission policy and the enrollment process. By inviting parents to community events, such as roller-skating parties and open houses, families will have the opportunity to connect, talk with staff, and learn more about the PLA educational model and enrichment programs. Fostering meaningful engagement with families in this way is essential to generating strong leads in the recruitment process and supporting retention after enrollment.

ii. Network-Level Financial Sustainability

At the PLA network-level, we maintain financial sustainability through the following strategies:

- Our financial model is sustainable on recurring, guaranteed state and federal revenues. Overall, over 95% of our revenues come from recurring government funding and fee-for-service contracts.
- Philanthropy plays only a supplemental role – supporting one-time expenses such as special projects and capital improvements that help to round out the educational experience.
- Our business model is designed to leverage earned revenues as the primary source of financial support for the central office.
- Through the capacity and decades-long experience of our senior leadership, we are intentional about building enterprise-level systems, processes and teams that can scale as we grow and support our financially sustainable business model.
- Since our systems and processes are designed to be replicable at each new school, school-level budgets do not bear the costs of these systems – this directly builds each new school's capacity to support network-level financial sustainability.
- As part of our resource allocation framework, 80% of all grant resources are allocated to planned expenses that are directly in service to the academic growth and overall well-being of our scholars.

iii. Contingency Planning

We have several contingency mechanisms built into our model to address potential shortages in revenue. At the school level, we ensure:
- A conservative revenue forecast is used.
- The staffing model is based on actual enrollment only.
- A 60-day cash reserve is targeted.
- The core budget model required to deliver the PLA model with fidelity is designed to be fully sustainable on non-competitive public funding.
- A full year forecast is maintained to identify any variances against the school-level budget and allow time for course correction as needed.
- Our budget model is able to achieve cost efficiencies while preserving the integrity of our educational model – for example, instead of hiring additional school-level staff, we leverage regional PLA staffers to support frequent, year-round professional development.

- All budgeted expenses are evaluated as they arise during the operational year to ensure that they are still necessary and remain the best, most strategically aligned use of funds.
- Adjustments are made for any unexpected increases in expenses or decreases in funding by reducing nonessential operating expenses that do not impact the scholar experience and reducing nonessential staff expenses that do not impact the scholar learning environment.
- Our responsive cash planning process is cascaded across departments to ensure that we are coordinated in ensuring strong student enrollment and expense management.
- Essential PLA educational systems such as the PLA Coaching Cycle and the Student Data Warehouse are network-wide resources leveraged through national investments, helping to defray expenses that would otherwise need to be placed on the school-level budget.
- A strategic resource allocation framework is implemented, where we strive to drive resources to eligible budgeted expenses to support the robustness of the general fund and facilitate the school's financial sustainability.

Similarly, at the network level, we support contingency planning through:
- A conservative revenue forecast.
- A staffing model that is based on actual enrollment only.
- A business model that is sustainable on fee-for-service contracts and not reliant on philanthropy.
- A 90-day cash reserve maintenance policy, which is higher than the nonprofit school operator sector average in the state; we are now working towards building a 180-day cash reserve.
- A full year monthly cash flow projection that facilitates the identification of any variances against the school-level budget and allows time for any course correction, as needed.
- An evaluation of all budgeted expenses as they arise during the operational year, including an assessment of whether they are still necessary and remain the best, most strategically aligned use of funds.
- Strong collaboration across cross-functional teams that allows us to identify current needs and make adjustments in real-time, as necessary.
- Network-wide investments in programs and systems that are based on actual funding received, meaning in part that supplemental programs are only added when funding is available.

iv. Impact on Network

As shared previously, new PLA charter schools are designed to become financially sustainable on recurring government funding. All new PLA schools use our standardized, proven framework of robust financial management practices. This framework has a strong track record of supporting the continued positive financial health of our schools and our network overall. We will replicate this proven financial management framework to support the new PLA school in Pike Township. Through the implementation of this framework, we anticipate the proposed school to add to the overall financial health and sustainability of our network.

In addition to our proven financial management framework, we also have data-driven, enterprise-level systems and processes in place to support this new school. Our core systems are designed to replicate best practices and distribute knowledge in a way that is effective in real-time. For example, one of our core systems, the PLA Coaching Cycle, embeds real-time feedback through biweekly classroom observations to support continuous knowledge-sharing and improvement. Similarly, one of our key processes, our weekly Professional Learning Communities, provides opportunities for educators to share their knowledge and best practices with us in real-time. When we add a new school, we also add talented educators to our network. As our enterprise-level systems are replicated at each new school, these talented educators help propagate knowledge-sharing and add to our current best practices. This strategic process of refinement through continued knowledge-sharing allows us to build the strength of classroom instruction at our schools across the network.

Most importantly, launching a PLA school in Pike Township is mission-aligned. Since 2013, as a network we have remained committed to our mission of identifying and serving scholars in traditionally underserved communities where there is a strong, urgent educational need. We have witnessed firsthand the difference it makes when children are surrounded by teachers who believe in their tremendous innate potential and empower them to unlock it. We see this new school as an opportunity to serve our mission and provide additional children access to the educational home that they deserve.

5. A description of the organizer's current or planned capacity to manage multiple schools. Specify how the organizer will ensure the governing board incorporates community input and access if the schools are located in different geographical locations across the state;

The George and Veronica Phalen Leadership Academies (PLA) is a nonprofit network of high-quality schools that was founded in 2013 to empower the academic achievement and overall well-being of children from traditionally underserved communities. We are proud to have launched our first school – George and Veronica Phalen Leadership Academy – in Indianapolis. Since then, we have expanded our efforts to serve Indiana scholars through additional schools in Indianapolis, as well as schools in Gary, Fort Wayne and Merrillville. Today, we are honored to serve 4,670 scholars across 12 schools in Indiana. PLA is also proud to serve communities in five other states. The PLA educational model has produced strong achievement gains at schools across Indiana. Highlights from our track record illustrate the power of our evidence-based educational model, as we have:

- Transformed six (6) F-rated schools to A-rated schools in Indiana (4 in Indianapolis, 1 in Fort Wayne, 1 in Merrillville).
- Earned school rankings of #2 for Math and #5 for ELA in the district (IPS) for strongest growth in SY21-22.
- Two PLA schools ranked in the top 100 of all 1,700 public and private schools in Indiana for their increases in ILEARN proficiency during SY21-22.
- Four PLA schools ranked in the top 25% of all public schools in Indiana for increases in ELA ILEARN proficiency from 2021 to 2022.
- Three PLA schools ranked in the top 25% of all public schools in Indiana for increases in Math ILEARN proficiency from 2021 to 2022.
- Increased scholar passing rates on the state ELA and Math tests by 2% and 4% from 2021 to 2022 - outperforming the states' increase in passing rates for both subjects.

Quality is the key driver of our approach to replication. The success of PLA scholars and partner schools can be attributed to the comprehensive, high-quality services that the PLA national office provides. We support our schools with:

- Collaborative, on-site support to improve instructional quality
- Data-driven professional development during the school year
- Dedicated support for teacher and school leader retention and development
- PLA Coaching Cycle for educators and school leaders
- Positive behavior management systems for improved school culture
- Supplemental educational resources aligned with curriculum maps
- Parental engagement framework and strategic support

Over the years, we have developed a comprehensive set of quality assurance mechanisms that help to ensure that all PLA schools deliver educational excellence to the scholars we serve. Below please find some of the key systems and processes essential to the replication of successful student outcomes:

Continuous, Data-Driven Professional Development: The PLA Coaching Cycle, our proprietary professional development program, implements weekly instructional observations to measure educators' ability to address the academic needs of scholars. On a regular basis, PLA's Academic Team works with instructional coaches and school principals to improve their ability to evaluate instruction and provide support aligned to the Coaching Cycle instructional domains. At regular opportunities, for example during the Leadership Institute or as part of weekly PLCs, the Academic team holds calibration workshops to build a common understanding among PLA instructional leaders of how to use the Coaching Cycle Evaluation Rubric. These calibration workshops help ensure that instructional leaders throughout the PLA network are supporting educators to work toward a common vision of instructional excellence and leveraging evidence-based interventions. The evaluation systems within the Coaching Cycle are re-calibrated in order to improve the quality of data made available to school and network leaders, therefore improving their ability to make decisions about the educational services provided to our scholars. Instructional experts hold collaborative observations, where participants discuss types of evidence they look for or the score range they give for that evidence. These learning opportunities support PLA's school leaders to efficiently and effectively support the instructional development of their educators, and therefore, the academic success of their scholars.

Implementing these professional development methods across all PLA network schools allows for streamlined replication, ensuring that all teachers and leaders have the same training and are guided by the same processes.

Talent Selection and Development: Our well-developed recruitment process also ensures smooth replication, as we are able to build a pipeline of exceptional teachers. Our recruitment process is codified in the PLA Recruitment Playbook which clearly organizes the timeline and processes to attract and hire the talent who will best serve our scholars. Through our staff referral program, we have built a robust pipeline of high-quality educators who have proven themselves successful working with the PLA model and creating successful student outcomes. Our Talent Recruitment Team also works closely with our Human Assets Team to holistically manage the entire lifecycle of staff development, including sourcing, screening, coaching, and retention. Given the crucial importance of school leadership to the success of a school, PLA has developed a Principal in Residence (PiR) program, a 6-18 month paid professional development opportunity that cultivates leaders who can effectively execute our evidence-based model. The PiR program fuels PLA's commitment to building talent from within by facilitating the career advancement of our most devoted educators. It represents one of the key innovative systems we have in place to attract excellent educators to our network schools and to further develop them into the world-class leaders our scholars deserve.

Training Institutes: During the summer months, our educators participate in one or more – dependent on their role – of three training sessions:
- Leadership Institute, a specialized week-long training for school leaders;
- Teacher Institute, a training program that prepares new teachers and returning teachers for success, and;
- New Teacher Institute, a week-long training program for new teachers (New teachers traditionally participate in two weeks of pre-service training.)
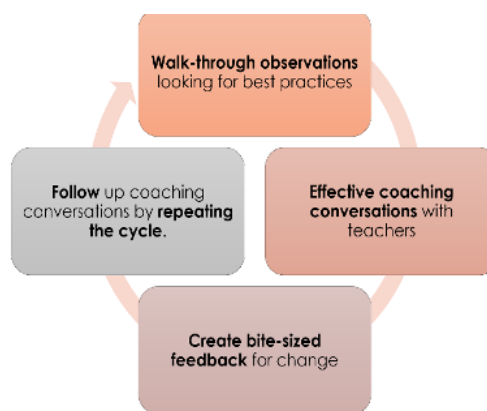
Through these institutes, teachers and school leaders have the opportunity to receive extensive training on evidence-based practices and develop their skills to ensure that PLA scholars receive the best education possible.

The PLA Coaching Cycle: In addition to the summer institutes, PLA has developed a proprietary system that provides in-person training and continuous progress feedback cycles throughout the school year. Our primary platform for staff development and retention, the PLA Coaching Cycle is a process that supports growing teachers throughout the school year in an intentional manner. The PLA Coaching Cycle platform includes six domains or focused areas of observations based on Charlotte Danielson's framework. Each domain includes eight indicators for success, creating a very quick and efficient walk-through form for each domain. The six domains are as follows:
- Culture and Behavior Management
- Classroom Management and Environment
- Scholar Engagement
- Effective Lesson Components
- Level 1 Instructional Execution
- Level 2 Instructional Execution

The first step of the Coaching Cycle is to conduct purposeful walk-throughs, looking for evidence of best practices. The second step of the cycle is to lead effective coaching conversations with each teacher. Relationship-building is crucial during this step of the process. During this step it is imperative that the coach offers coaching side by side, gives positive feedback, and asks leading questions that guide the teacher to identify their own next steps. The next step of the Coaching Cycle is collaboratively creating a bite-sized goal for change; both the teacher and coach are accountable for the change. The final step before the cycle repeats is a follow-up observation from the same domain, looking for evidence of change according to the bite-sized goal.

The PLA Coaching Cycle has an online platform that allows leaders at both the network level and the school level to identify strengths and opportunities for improvement, both holistically for the school and individually for the teachers. This allows for the Coaching Cycle to be implemented with fidelity across all PLA schools. Teachers immediately receive their observation feedback through email following the walk-through. The sophisticated analytics provide leaders with feedback to ensure we are coaching up our teachers to ensure we provide our scholars with the education they all deserve. A toolbox of strategies and resources for each coaching area is also available within the Coaching Cycle online platform. The toolbox provides short video clips, activities, articles, book recommendations, and PLA Learning Institute modules to assist with teacher growth.

PLA Learning Institute: PLA Learning Institute is an online learning hub that is aligned to teacher evaluation tools, with resources available for teachers and school leaders to download and customize. PLA Learning Institute's 72 modules fall into seven categories. Full course modules are available for each topic complete with quizzes, teacher reflection, and self-evaluation. The content of each training module includes narrated presentations, videos, classroom activities, implementation examples, an online discussion forum, shareable resources, and research/scholarly articles. Completion of modules is tracked in the Canvas LMS. Modules include topics such as Scholar Behavior and Classroom Management; Curriculum Mapping; Implementing Evidence-Based Curricula; Evaluation, Assessment, and Data-Driven Instruction; and Parents as Partners. This system is critical to PLA's philosophy of working to retain the existing staff at its partner school sites and provide them with the professional development and training that they need to guide our scholars toward academic success.

Professional Learning Communities: Each week, teachers participate in Professional Learning Communities, or PLCs, in which they come prepared with student assessment data and performance artifacts to (a) collaboratively analyze student data and identify areas in need of improvement; (b) compare and share instructional strategies and resources; (c) collaborate design appropriate interventions, including for example the incorporation of content literacy across subjects within a grade; (d) develop and refine curriculum mapping; and (e) organize model lessons on specific strategies and standards so that teachers can learn from their peers to improve their own practice. These weekly meetings also provide a venue for educators to collaborate and learn new skills from their peers. During PLC meetings, teachers can develop interventions and learn new approaches to implementing best practices. This is also an opportunity for teachers to collaborate with each other to exchange best practices, and ask each other for support. PLCs include focused workshops, planning time, and data deep-dives. PLA's Academic Leadership Team supports each school in facilitating their professional learning communities and the culture of learning that is essential to supporting these communities.

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

Performance Management: PLA schools receive support from the network office to ensure operational excellence, so that our school leaders and educators can focus on robustly supporting scholars and families. Support services include professional development, payroll, policy development, legal counsel, and grants management. PLA's functional teams— Academics, Recruitment, Human Assets, Operations, Finance, and more—will coordinate to support our school personnel in ensuring strong educational and operational performance Please see below for a summary of our key performance management mechanisms:

Domain	Systems	Processes
Instructional Excellence	This includes PLA Data Dashboards, Custom-Built Assessments, Initial School Rubric, Onsite Comprehensive Analysis, Interview Rubric, Classroom Observation Feedback Framework, Comparative Analysis Matrix, and 30- 60- 90-Day Action Plans.	Goal-setting sessions, weekly meetings, quarterly step backs and annual planning sessions help the school internalize and implement a comprehensive strategy for achievement, including Small-Group Instruction and the PLA MTSS process.
Professional Development	This includes the PLA Coaching Cycle, PLA Teacher and Leadership Institutes, New Teacher Institute, Professional Learning Communities (PLCs), Coaching Cycle for Leaders, Principal-in-Residence Program and PLA Learning Institute.	Bi-weekly observational walkthroughs are conducted, with observations and best practices captured in the PLA Coaching Cycle platform. Weekly Professional Learning Communities provide opportunities for peer support. BOY, MOY and EOY Reviews support progress monitoring.
Climate & Culture	This includes the PLA Positive Behavioral Interventions and Supports (PBIS) framework, data-driven behavior management system; Climate and Culture-focused domains of our Training Institutes; enrichment experiences and scholar recognition program.	Daily enrichment courses in art, science, entrepreneurship, Black History, and more immerse scholars in dynamic interest-based learning. Black and Brown Speaker Series connect scholars to role models. Progress reflection cycles and scholar incentives reinforce positive choices. PLA Climate and Culture Staff Surveys and scientifically validated Parent Engagement process provide holistic support for scholars and families.

With these robust systems and processes in place, PLA is well-positioned to ensure that our evidence-based educational model is replicated with fidelity so that our scholars can continue to experience educational success.

PLA is also proud to have a strong leadership team whose role is to support the success of our schools and scholars. Our leaders are committed to improving the lives of children in underserved communities. The team as a whole brings decades of classroom experience, school and instructional leadership track record, project management expertise, and substantial knowledge in key operational aspects, including compliance, reporting, and program management. Our senior leadership team offers exceptional experience in a wide range of

functional areas, allowing our school leaders and teachers to focus fully on the academic success of our scholars. Below please find some of our key leaders and their qualifications:

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

Andrea Robinson, Chief Academic Officer: Andrea has 23 years of working in the field of education as an educator, instructional coach, building leader, and state DOE employee. She received her BA from Indiana University in elementary education and her master's degree from Indiana Wesleyan University. Andrea worked as a teacher in the intermediate grades in a Title I elementary building. She received the Sallie Mae First Class teacher award and Olin Davis Award. She was also recognized for her passion in teaching when she was honored with the district-wide Indiana Teacher of the Year award in 2009. She eventually became the instructional coach for her K-5 building where she used her knowledge of best practices to lead other educators in professional development, classroom management, differentiation, PBIS, tiers 1-3 instruction/intervention and data analysis to drive effective classroom instruction. As a building leader, she helped lead her building from an accountability grade of an F to an A in two years. Andrea has also provided professional development for the University of Indianapolis' elementary education program and for educational webinars with Kappa Delta Pi. Andrea most recently worked at the Indiana Department of Education in the Office of School Improvement as an Outreach Coordinator for Marion County, working closely with schools and districts to develop best practices for schools in turnaround status. After conducting classroom walk-throughs and leadership/staff interviews, she worked with the school leadership team to develop the next steps that met the needs of each individual school. She often provided differentiated professional development for each school for this process. Andrea also served as the IDOE case manager for a district in the State Development Network (SDN) to ensure the development of district system alignment and improve student achievement.

Nikki Watts, Director of School Improvement: Nikki Watts has been in the education field for over a decade in a variety of service roles. She has been a primary classroom teacher and then led two schools as Instructional Coach. Nikki joined PLA in 2019 as Director of Training to support teachers and leaders throughout the network with data driven instruction, best practices for instruction, and classroom community building. As Director of Training Nikki supported schools with implementing instructional processes such as Professional Learning Communities, Multi-Tiered Systems of Support, and Positive Behaviors and Supports. In her current role as Director of School Improvement, Nikki supports schools with implementing instructional programs to accelerate scholar learning.

Maxwell Shultz, Director of Data Analytics: Maxwell has a BA in Earth Systems – Society and the Environment, from University of Illinois at Urbana-Champaign. Prior to working at PLA, Maxwell served as the Director of Operations for a school in Michigan, as a Data Analyst and Project Manager for Star Educational Services and as a Teacher with Teach for America. Maxwell has worked closely with data and assessments throughout his career, managing NWEA testing schedules, procedures, and analysis, as well as creating data visualizations to inform classroom instruction.

Nicole Fama, Indianapolis Regional Director: Nicole's key strengths include providing strong school leadership; building positive student, family, and community relationships; implementing the Restore model with fidelity; and creating innovative educational strategies. She served as an educator in the Indianapolis Public School (IPS) district for over 13 years, including six years as a Dean of Student Discipline. During this time, she co-founded the Restore educational model, created all discipline policies and procedures, and piloted the project at Arlington Woods High School. This model has transformed 5 F-rated schools into A-rated schools.

Arely Benavides, Chief Operating Officer: Arely has more than twenty years of experience in operations, strategy and logistics. While her work began as a management consultant with Accenture and Kurt Salmon Associates, she transitioned to lead operations with consumer products companies like Oakley and VF Corp. Over the last eight years, she has worked in education including five years at IDEA Public Schools as the Child Nutrition Director and then Senior Vice President of Operations. Arely graduated with a Bachelor of Science degree in Operations Research and an MBA from MIT, and obtained her Masters in Administration, Planning and Social Policy from Harvard.

Tiffany Walter, Director of Enrollment: Tiffany M. Walter has served as an Enrollment Management Professional, with 15 years of progressive enrollment, recruitment, and management experience ranging in depth and aptitude. Tiffany is a Registered Enrollment Professional by the Georgia Institute of Strategic Enrollment Management (GISEM). Tiffany holds a Master's of Education Degree, with an Emphasis in Curriculum & Instruction as well as a Master of Arts Degree in Religion, with an emphasis in Leadership. While the vast majority of her career consisted of higher education work experience, Tiffany began her career in education as a Special Education teacher.

Tahirah Thompson, National Director of Facilities & School Launch: Tahirah graduated with honors from Howard University with a bachelor's degree in Business with an emphasis on Marketing. Prior to joining the Phalen Leadership Academy team, her major work experience included artist retail marketing with SonyBMG in New York, and analyst & project management work with Pacific Gas & Electric Company (PG&E) in San Francisco. During her time at PG&E, Tahirah realized that she was passionate about children, education, and service to the underprivileged youth. Taking a leap of faith towards her passion, she transitioned from the corporate world to the education sector. Since changing her career path to education, she has served as a 6th, 7th, and 8th grade math interventionist, an 8th grade special education math teacher, and a 6th grade social studies teacher in the Metro Atlanta Area. In her most recent position, prior to joining Phalen, she has served as the Director of Operations at a turnaround charter school in Chicago. As an experienced Director of Operations, at a Chicago Public Charter school, she has exceptional leadership skills, is highly organized, has a knack for logistics planning, and pays great attention to detail. She has successfully implemented numerous school-wide systems and procedures, managed faculty and data, and worked side by side with the principal to improve the overall functionality of the school.

Nicole Scott, Chief of Compliance, Legal and External Partners: Nicole Scott has over 12 years of experience as an attorney and leader in the education/charter school industry. Most recently, Nicole served as Chief of Employee Solutions & Legal Affairs for KIPP Los Angeles Schools. In this role, Nicole served as General Counsel and led the human resources department for all school sites operated by KIPP LA. Nicole also managed the relationship between KIPP L.A. and Los Angeles Unified School District, the organization's authorizer. She was instrumental in getting a K-8 charter school approved through Compton Unified School District for KIPP as well. Prior to joining the KIPP team, Nicole worked with the Inner City Education Foundation as SVP of Talent and General Counsel where she was instrumental in getting the first charter middle school approved through Inglewood Unified School district. Before committing her career to education, Nicole was an associate at a leading law firm in Los Angeles and worked for various entertainment companies such as Sony Pictures and the William Morris Agency. Nicole is a proud alumna of Spelman College and the UC Berkeley School of Law, Boalt Hall.

Lili Gilbes, Associate Director of Compliance: Lili has an IT background in Computer Network Operations and Systems Analysis. She joined PLA in 2017 and enjoys utilizing her skills to contribute to the organization's mission. She works in close collaboration with our legal, academic, finance, operations and

development teams to facilitate compliance with policies and procedures, risk management, data reporting and state/federal requirements.

Adrienne Page, Director of Special Education: Adrienne came to PLA with 9 years of experience in special education. At her previous position as Special Education Specialist with Indianapolis Public Schools, she increased academic achievement in special education students by providing direct support to classroom teachers and special education teachers. In this role, Adrienne would provide coaching to teachers in customizing classroom instruction as well as daily routines and procedures to accommodate the unique needs of special education students. Prior to this, she worked directly as a Special Education Compliance Monitor for Indianapolis Public Schools district, evaluating and ensuring IEPs, ACRs and other special education records and policies followed local compliance laws. Adrienne is a graduate of Marian College and Kentucky State University.

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

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

Cheri Shannon, Chief Growth Officer: A steadfast believer in education reform, Cheri began her work in the reform movement in 1995, serving as Executive Director of the Coalition for Essential Schools. She was quickly tapped to serve in top school leadership positions in the charter sector in Kansas City and was the founding principal/superintendent of University Academy. Following 6 years of service within charter schools and being recognized as an emerging leader in the field, Cheri was chosen to lead the Missouri Charter Public Schools Association in 2009, followed by the Florida Charter Schools Association in 2011. In her tireless work to advance the charter movement and continue to make a difference in the landscape, Cheri's talents in new school development became widely recognized and she quickly gained a reputation for her instrumental work in growing and launching schools, inspiring her to serve as an educational consultant to serve others in this capacity. Cheri earned her Master of Science Degree in Educational Leadership and Policy from Arizona State University and Bachelor of Science in Education from Southwest Missouri State University. Cheri has completed the coursework for her Doctorate of Philosophy in Educational Leadership from the University of Nebraska and has an Education Specialist Degree from the University of Missouri. Combined with her rich experience in public education, Cheri is recognized as an expert in the industry and has contributed thought leadership through numerous roles and opportunities throughout the nation.

Eva Spilker, Chief Financial Officer: Eva has served as Controller and Finance Director at Diamondback Direct, an international division of Quadriga Direct Mail Holdings—a leading global provider of direct marketing services. Her responsibilities included all finance and accounting functions as well as short- and long-term forecasting, payroll and benefit management, internal and external reporting, executive team and board presentations, margin and audit management, and annual budgeting. Eva's career in finance began in the Corporate Financial Consulting Division of Ernst & Young in Baltimore, Maryland. She then transitioned

to the Economics Group of CSX Intermodal where she developed long term planning models as well as all capital expenditure justifications and analyses. After CSX, Eva transitioned to a partner role in a regional advertising agency where she managed all finance and operations functions. Eva holds an economics degree from the University of North Carolina at Chapel Hill.

Johnny Jin, Chief Strategy & Development Officer: Johnny brings over 12 years of proven leadership in institutional advancement to achieve large-scale social impact. As a core member of the PLA founding team, Johnny helped grow a regional summer learning pilot into a high-performing school network serving over 10,000 children across the country. In this capacity, Johnny develops pathways to scale; oversees the procurement of grants and contracts; and facilitates the calibration of strategy to drive sustained growth and success. Johnny has consulted with companies and initiatives on projects concerning early childhood literacy, city-wide arts education, social studies innovation, and adult professional development. Johnny is a first-generation college graduate. He earned his BA in Economics from UC Berkeley (where he graduated early in two years), and a Master's in Education Policy and Management from Harvard.

In addition to the national team, PLA's governing board is made of members who possess expertise in core functional areas including education and instructional leadership, professional development, nonprofit management, facilities, community engagement, business, and financial administration. Based on past experience and expertise, we are expecting a smooth transition for the board to expand their current roles. PLA is a non-profit operating as the CMO, and the PLA board has extensive experience governing schools. Taking this into consideration, we recognize the addition of potential schools as an expansion of their current duties. The PLA board will continue to uphold all current responsibilities for this new proposed school including governance and oversight processes and performance management systems. As part of the responsibility of governing a new school, we will ensure that the board has the opportunity to visit the new school and meet with key stakeholders and campus leadership as they are identified.

Our governance structure is one that intentionally includes key stakeholders through a variety of mechanisms built into our model. Primarily, we see this within our professional development system, scholar check-in sessions, and our evidence-based family engagement framework. All board meetings are open to the public which encourages engagement with families and community stakeholders.

One opportunity to engage stakeholders is to focus on the academic and personal needs of scholars. Through the professional development cycle, staff will be trained in providing additional support to scholars. Teachers will create opportunities to listen intently to scholar needs, actively involve them in understanding and pursuing personalized academic progress goals, support them in their learning process, and give shared ownership to our scholars in making academic progress. Examples of this extra support will include: teacher lunches with groups of kids who are facing the same challenging situations (e.g., being homeless, having an incarcerated parent, or being in foster care) and check-in sessions. In check-in sessions, teachers will review with students their progress on weekly assessments, identify standards for further learning, and set a quantifiable goal for the next check-in. During these sessions, PLA teachers guide students in recognizing their own improvement and reflecting on the effort and hard work that created improvement. This is further facilitated by recognizing growth during check-in sessions, not just letter grades. Students will be explicitly and regularly rewarded for progress toward shared goals. We will also display student work and teacher kudos in both hallways and classrooms, communicating regularly with parents about kids' successes, and honoring kids who do things for others.

PLA prioritizes family engagement and makes a concerted effort to deepen its relationships with families. Scholars and families also have access to outside support services to meet more intensive scholar needs, and families are involved in planning for the optimal growth and development of their child. Teachers are trained to authentically partner with families and understand scholar needs, and to support family success through events, parent workshops, and more. One example of this is Parents in Touch days at the school, where families and teachers can delve into a scholar's academic and behavioral progress towards goals. We will also invite families to visit their child's classes, participate in field trips, or support the school in any way they feel comfortable. Teachers also communicate regularly with families through biweekly report cards, parent newsletters, and making calls home not only to report challenging behavior, but also to praise examples of

positive behavior. We will maintain an open-door policy and invite families not only to school events, but also to participate in the classroom where they can meaningfully engage with their children as well as the teachers and staff at the school. The PLA family engagement process ensures that families are able to a) voice their input on their child's academic needs and interests; b) understand the PLA model and how it works within the school to strengthen student achievement; and c) access real-time feedback from educators through regular communication channels. Through these specific strategies, PLA ensures that families are partners in achieving school success.

6. A completed [Academic Performance Workbook](#) with academic data (where applicable) starting with the 2018-19 SY including ILEARN, IREAD-3, as well as both CCR and graduation rates from the organizer's other Indiana schools.

Please see attached.

7. If you are in the process of identifying a facility, describe with as much detail as possible the viable facility options that your team has identified. If you have already identified a facility, or plan to locate the new school within a facility currently owned or leased by the applicant, please indicate the street address and the school district in which the building is located. Describe the facility, including whether it is new construction, part of an existing public or private school building, or part of another type of facility. Provide a detailed list of any anticipated construction or renovation costs (these should be described in the budget narrative and reflected in the budget). If possible, provide a layout and description of the proposed facility. Include the number and size of classrooms, common areas, recreational space, any community facilities, and any residential facilities. Explain how the facility will meet the needs of any students who are physically challenged. Will students be able to walk to school or will all students require transportation of some type? If transportation is needed, what options will be provided?

We are currently in the process of identifying a facility in Pike Township. Upon formal approval of the charter, we will move forward with finalizing our facility arrangements. We will ensure that information on our selected facility, financing approach, and agreement terms are shared in a timely manner with the ICSB. Additionally, we will include information regarding the physical layout, a description of the facility and any transportation options that will be provided to students.

Once a facility is identified we will use our design principles and prior experiences to create a safe, secure and sustainable learning space. At the proposed facilities, classrooms will be designed to provide for personalized learning experiences throughout the school day and year. In our effort to provide scholars with an interactive, dynamic learning experience in the classroom, we will configure classrooms specifically to help facilitate teacher-student and peer-to-peer interactions in our rotational stations. We will also ensure adequate space for hands-on, interactive learning experiences where scholars can engage in project-based learning and creative tasks that use various learning tools and approaches. All spaces within the facility will promote safety, collaboration, meet all ADA requirements and provide for engagement of students and staff alike.

Holistically, facilities will be modern, safe, clean, and welcoming environments. We are working with our longtime partner, the Charter School Development Corporation (CSDC), to identify and secure the facilities for our proposed schools. Since 2013, CSDC has successfully helped PLA identify, purchase, and renovate (if necessary) suitable school facilities. For example, CSDC supported PLA in the acquisition and renovation of the building for PLA's founding school, the George and Veronica Phalen Leadership Academy, and for PLA's middle/high school, the James and Rosemary Phalen Leadership Academy. The facility identification process is a structured workflow that includes comprehensive market due diligence, building compatibility analysis, and price negotiations. Some of the key services we will retain from facility partners include: acquisition & renovation of an existing building; acquisition of land and construction of a new building; expansion in current facility; financing; and real estate consulting services.

Once a facility is selected, we will obtain cost estimates for facilities construction or leasing from the CSDC, as well as the terms of any loans that may be needed to cover these costs. In addition, PLA will collaborate with the CSDC, building owners, real estate agents, and community agencies to ensure that high quality vendors are selected to provide construction or renovation services. Based on an ongoing and careful analysis of local data and typical facilities costs in our selected community, as well as meetings with local partners, we will be able to budget sufficiently and reasonably for an annual lease or purchasing agreement, construction and repairs, insurance, furniture, and utilities.

8. Please provide evidence of demand from the community, evidence of community engagement, and evidence of support from community partners. This may include documentation of public forums held, meetings with community leaders (e.g., mayors, council members, neighborhood leaders), letters of intent and/or memoranda of understanding, and should specify the resources to be committed or contributed from the partner, as applicable. Please prepare a detailed plan to accomplish successful community engagement after ICSB approval, during the school's pre-opening period, and leading into the school's first year.

PLA deeply values the input and support of the community throughout the process of developing a new school. For that reason, PLA makes intentional efforts to engage with the community at existing events as well as creating opportunities to receive feedback. PLA views strong community and parent partnerships as critical elements to building a positive school culture. We also want to be sure to create opportunities between the approval and the opening of the proposed schools in order to continue to develop relationships and encourage feedback from these key stakeholders throughout the process. PLA prioritizes family and community engagement while developing a school as a core tenet of the PLA model. PLA attended a number of community events and reached out directly to community members and businesses. PLA identified, attended, and presented at community events, in addition to attending and engaging with community members at church meetings, housing complexes, shopping plazas, and community centers.

Through these efforts, we were able to connect with families and gather preliminary evidence of support, including 92 signatures of interest from potential family members, and several letters of support from community leaders, parents, and business owners. During the planning year and summer months leading up to the opening of PLA Pike, PLA will continue working to identify community partnerships that provide meaningful services and support to our scholars and families. Through our work in the Indianapolis community over the years, PLA has engaged local community-based agencies to connect scholars and families to key services such as mental health, employment, afterschool, medical/dental services, and housing. Finally, prior to the start of the school year, PLA schools will host open houses for all scholars and families to allow parents to meet school staff personally, ask any questions that they have, and build a level of familiarity with the PLA educational model and the staff at the school. This open house will be critical in our effort to enlist our parents as partners in their child's education and establish a culture of collaborative family involvement from day one.

We have been able to build trust with families in the communities we serve because PLA staff authentically engage and partner with families from the very start of a school partnership. We will implement PLA's evidence-based parental engagement framework to ensure that our parents become partners in our work. We will meet with families prior to the launch of our new school partnership to understand what they are looking for in their child's school. To create an inclusive and welcoming environment for our families, we will employ a mix of family engagement strategies throughout the school year, which meet the unique needs of our families. PLA's framework for engaging parents and families is designed to make sure that families understand the PLA educational model and how it works to strengthen student achievement. Our school's welcome families during Parents in Touch days, where teachers sit side-by-side and work to invest families in their scholars' academic progress data. Together, teachers and families will delve into a scholar's progress toward academic and behavioral goals, ensuring that we are working in partnership to support the development of scholars. We will maintain an open-door policy and invite families not only to school events,

but also to participate in the classroom where they can meaningfully engage with our scholars. Hosting parent events is a signature component of our parental engagement strategy. Examples of family events PLA schools have hosted include:

- Late summer ice cream socials, which serve as an opportunity for parents to meet teachers and school administrators.
- Open houses to familiarize parents with the core school components as well as to expectations.
- One-on-one parent-teacher meetings, called Parents-In-Touch days where teachers provide an in-depth, customized look at each child's performance and behavior through an analysis of student data.
- All-Pro Dads breakfasts and Muffins with Moms, which provide a warm environment to get to know our parents, answer their questions and share how we will support their children.
- Events that showcase our children's accomplishments, including holiday celebrations, January Art Fair, Black History Month Expo, and basketball games.
- Schoolwide scholar recognition events, which serve as a chance for parents to see their children shine.

Further, in order to develop relationships of trust with families, we give our parents consistent access to real-time feedback from educators through communication channels. At our proposed schools, we will communicate regularly with families through biweekly report cards, parent newsletters, and phone calls home— not only to discuss challenging behavior, but also to praise examples of positive behavior. We will make sure that our families are able to voice their input on their child's academic needs and interests. In order to seek feedback and communicate with stakeholders, PLA's Communications team will leverage a wide variety of communication channels, including: a school web page and cell phone app; Facebook, Twitter, YouTube and Instagram accounts; print media, including brochures and targeted mailing lists; media campaigns; the student information system; and PLA's network sources, which include the PLA web page as well as internal and external newsletters. Our school leadership team will meet extensively with parents, community-based organizations, and community leaders to listen through interviews, focus groups and informal conversations.

9. What other school options exist in the targeted location for your proposed school? In list or table format, describe all other public schools, traditional and charter, in the immediate vicinity with the same or a similar grade level configuration. In the list or table, include the following information for each school: the distance from your proposed location, the most recent enrollment figures by grade level, and school level performance data for the most recently completed school year with valid data. Some of this information may be found on the IDOE INview website: https://inview.doe.in.gov/. More specific school level academic data may be found in the school and corporation reports section of IDOE's website: https://www.in.gov/doe/it/data-center-and-reports/. Ensure that all performance data comparisons are "apples to apples," that is: 1) grade levels should be identical or very similar; 2) subgroup comparisons should be identical or within a close (~5%) range; and 3) categories of comparison, including SY, grade levels, academic subjects or tests (e.g., Math, ELA, IREAD), methods of measurement (growth or proficiency), and data types (scores vs percentages) should be the same. Do not use ISTEP data for comparison in grades 3-8.

PLA has developed an educational model tailored to meet the needs of children who are traditionally underserved. Our vision is to empower children to achieve academic success through holistic support, personalized interventions and data-driven decision-making that allows our team to understand and meet scholars' individualized needs. PLA has achieved remarkable success working within communities of color and supporting children who have experienced chronic academic underperformance. Through our proposed school, we hope to meet this educational need and provide access to high-quality public-school options to children and families.

Based on the latest available state accountability data, no K-8 school in the MSD Pike Township district is A-rated. The U.S. Department of Education approved Indiana's request for a waiver from certain federal accountability requirements, including the requirement to assign federal ratings for the 2020-2021 and 2021-2022 school years. Additionally, pursuant to House Enrolled Act 1093 and Senate Enrolled Act 290, the Indiana Department of Education (IDOE) did not calculate A-F grades for schools or corporations for the 2021-2022 school year. The most recent state grades available are from the 2019-2020 school year. In MSD Pike Township, over half of the schools serving K-8 students are C or D rated. The need for high-quality public education is most urgent for scholars living in traditionally underserved communities. The following tables show data for all schools serving 75% or more students of color.

SY 2021-2022 Enrollment Data for K-8 Schools in MSD Pike Township Serving Primarily Scholars of Color*				
School	State Grade*	Enrollment	% Scholars of Color	% Scholars eligible for F/RP meals
MSD Pike Township (Total)	B	10,928	99%	73%
Central Elementary School	D	665	96%	77%
College Park Elementary School	B	465	97%	81%
Deer Run Elementary	B	588	97%	78%
Eagle Creek Elementary	B	490	88%	66%
Eastbrook Elementary	C	522	94%	80%
Fishback Creek Public Academy	B	460	77%	51%
Guion Creek Elementary	B	592	94%	74%
Guion Creek Middle School	D	919	97%	83%
Lincoln Middle School	D	871	94%	79%

New Augusta Public Academy - North	C	861	86%	62%
New Augusta Public Academy - South	C	475	96%	75%
Snacks Crossing Elementary	C	633	96%	79%

* This reflects the most recent accountability grades available from the state of Indiana determinations from the 2019-2020 school year.

The need for additional high quality public schools is also reflected in proficiency scores for these schools on the most recent state summative assessment, ILEARN. This is particularly true for historically underserved students. The table below highlights ILEARN scores for ELA and Math at the schools listed above, broken down by student demographic groups:

ELA and Math Proficiency on the 2021-2022 State Summative Assessment for K-8 Schools in MSD Pike Township Serving Primarily Scholars of Color								
School	**ELA Proficiency**				**Math Proficiency**			
	Overall	**FRPL**	**Black**	**Hispanic**	**Overall**	**FRPL**	**Black**	**Hispanic**
State Average	*41%*	*27%*	*19%*	*28%*	*39%*	*25%*	*14%*	*25%*
MSD Pike Township Average	*22%*	*18%*	*18%*	*19%*	*14%*	*11%*	*11%*	*10%*
Central Elementary School	8%	7%	8%	7%	7%	7%	7%	3%
College Park Elementary School	20%	19%	12%	28%	10%	11%	5%	21%
Deer Run Elementary	10%	8%	8%	10%	14%	14%	11%	12%
Eagle Creek Elementary	37%	29%	31%	15%	32%	22%	25%	11%

Eastbrook Elementary	19%	21%	15%	23%	17%	17%	15%	18%
Fishback Creek Public Academy	40%	28%	29%	26%	43%	28%	31%	26%
Guion Creek Elementary	27%	21%	22%	22%	26%	19%	21%	21%
Guion Creek Middle School	19%	18%	18%	19%	8%	7%	6%	8%
Lincoln Middle School	20%	19%	17%	22%	6%	6%	4%	7%
New Augusta Public Academy-North	31%	23%	24%	23%	16%	10%	10%	9%
New Augusta Public Academy - South	17%	15%	16%	12%	17%	15%	17%	12%
Snacks Crossing Elementary	13%	11%	12%	13%	10%	7%	13%	3%

Across all MSD Pike Township schools, the scholar proficiency rate was 22% for ELA and 14% for Math. Delving into school data, as highlighted in the table above, the proficiency rates by school and demographic breakdown are similar to the district averages. The district has a high concentration of scholars of color, at 99%, and 73% of scholars come from economically disadvantaged backgrounds. At the district level, students who come from economically disadvantaged backgrounds and students of color underperform the district average by three to four percentage points. Another salient metric that helps determine need is year-to-year growth, as demonstrated in the chart below.

Overall Growth Data for SY21-22 in MSD Pike Township												
Category	**ELA Proficiency**											
	Overall 2021	Overall 2022	Y/Y Change	FRPL 2021	FRPL 2022	Y/Y Change	Black 2021	Black 2022	Y/Y Change	Hispanic 2021	Hispanic 2022	Y/Y Change

State Average	41%	41%	0%	26%	27%	+1%	17%	19%	+2%	27%	28%	+1%
MSD Pike Township Average	25%	22%	-3%	20%	18%	-2%	21%	18%	-3%	23%	19%	-4%
Category	**Math Proficiency**											
State Average	37%	39%	+2%	22%	25%	+3%	12%	14%	+2%	22%	25%	+3%
MSD Pike Township Average	15%	14%	-1%	12%	11%	-1%	10%	11%	+1%	13%	10%	-3%

Overall, state data shows no growth in ELA proficiency and a 2% proficiency increase in Math between academic year 2020-2021 and 2021-2022. The state data also sees increases in ELA and Math across all demographic groups between 1% and 3%. By comparison, MSD Pike Township saw a 3% decrease in ELA overall proficiency and a 1% decrease in Math overall proficiency. This trend is largely mirrored across demographic groups, where we see drops between 1% and 4%.

Student achievement data demonstrates the need to provide additional high-quality public-school options for children and families in the Pike Township community. Through our proposed school, we want to meet this educational need and provide access to an additional high-quality public-school option to children and families in the area. Children who are already dealing with the challenges that accompany living in poverty deserve extra care and attention from adults who share their background and possess the expertise to guide them to success. PLA is led by a highly diverse leadership team dedicated to serving children of color and has achieved success working within these communities. PLA's organizational leadership reflects the community we serve: our organization is one of the very few public-school networks in the country serving children of color that is led primarily by people of color. We understand the needs of our community because we come from the neighborhoods we serve. Across the PLA network, in school year 2021-2022, 84% of all scholars were Black and Latinx, and 80% of scholars were experiencing poverty.

The PLA educational model has repeatedly proven that it can raise academic proficiency for scholars from traditionally underserved communities by optimizing time spent in core subject instruction. As highlighted previously, to date, the PLA model has enabled six previously F-rated schools to transform into A-rated schools. During school year 21-22, four PLA schools ranked in the top 25% of all public schools in Indiana for increases in ELA proficiency, and three PLA schools ranked in the top 25% of all public schools in Indiana for increases in Math proficiency from 2021 to 2022. Rigorous curriculum, high-quality professional development, an embedded coaching cycle that develops teachers, enrichment opportunities for scholars, and authentic partnerships with parents are core elements of the PLA educational model. With your partnership, we can provide additional high-quality public-school options for the children and families we serve.

10. A completed Experienced Operators Proposal Overview;

Please see attached.

11. A completed Enrollment Plan (Tab 1), which may be found on ICSB's Application Documents webpage under the Heading "Charter School Application for Experienced Operators";

Please see attached.

12. A description of any planned changes from the school model(s) approved in the organizer's original Charter Application; and

N/A

13. A detailed start-up plan for opening the new school, including specific planning tasks by month, and the individual or individuals responsible for each task.

Please find our start-up plan below.

Task	Responsible Staff	Timeline
Charter Approval		
Charter application and approval	CEO and Development	August 2022 – January 2023
Register for corporation and school numbers	Legal	January 2023 – April 2023
Finalize agreement with Authorizer	Legal	January 2023 – June 2023
Complete state and federal filing requirements—registering as state vendor, ensuring good standing for IN Secretary of State, etc.	Legal	January 2023 – June 2023
Ensure board member names are posted and up to date on the school's website, per Indiana statute	Legal and Operations	May 2023
Submit to Authorizer a copy of ratified board by-laws (if Authorizer does not have ratified copy already or if changes have been made)	Legal	May 2023
Submit to Authorizer minutes from one Board meeting within the 60 days preceding the pre-opening site visit	Legal	June 2023
Staff Recruitment, Training and Onboarding		
Create written staffing plan with number of teachers by grade level, subject area, and title, as well as admin positions; submit to Authorizer and keep on file	Recruitment and Human Assets	March 2023

Recruit all staff and leadership, including hiring or contracting a school nurse as required by Indiana administrative code	Recruitment	February 2023 – May 2023
Conduct expanded background check for school leadership, staff and volunteers (including parents) who have contact with children, and all board members; submit to Authorizer and keep documentation on file	Human Assets	February 2023 – May 2023
Provide written notice that principal has been hired to Authorizer along with a copy of the head of school's resume	Human Assets	February 2023 – June 2023
Provide Authorizer with updated organizational chart including names of specific individuals occupying key leadership roles at the school	Human Assets	February 2023 – June 2023
Prepare professional development programming for all staff, including training on FERPA, serving SPED students, and health record procedures	Academics and Human Assets	March 2023 – June 2023
Provide Authorizer copies of signed contracts for certified Special Education staff, speech and language therapists, occupational and physical therapists, etc.	Special Populations	June 2023
Provide Authorizer copies of signed contracts for qualified English Language Learner staff as required to meet the needs of enrolled students	Special Populations	June 2023
Obtain copy of valid Indiana teacher's license for on-staff special education teacher of record; submit to Authorizer and keep on file	Human Assets and Special Populations	July 2023
Implement summer training for staff (Teacher Institute, Leader Institute)	Academics and Human Assets	June 2023 – July 2023
Academic Planning		
Prepare master school-year calendar and daily class schedule and submit to Authorizer	Principal, Academics and Compliance	February 2023 – April 2023
Align and identify teacher assignments by grade level and classroom	Principal and Academics	March 2023 – May 2023

Complete preparations to provide instruction in each approved grade	Principal and Academics	March 2023 – May 2023
Finalize lesson plans and pacing guides aligned with performance data and aimed at bolstering student achievement	Principal and Academics	April 2023 – June 2023
Order and appropriately distribute curricular materials, computers, and supplies aligned with instructional planning	Principal and Academics	April 2023 – June 2023
Identify and align interim, formative and benchmark assessment tools	Principal and Academics	May 2023 – July 2023
Identify, align and integrate student data management system with educational program and assessment framework	Principal and Academics	May 2023 – July 2023
Ensure curricula, instructional materials and overall academic framework are effectively customized for special education students, English Language Learners, gifted scholars and other scholar subgroups	Principal, Academics and Special Populations	May 2023 – July 2023
Ensure student behavior management policy is effectively customized and inclusive of all scholar subgroups	Principal, Academics and Special Populations	June 2023 – July 2023
Embed adaptive learning programs into current academic framework, using them to design small-group rotations, and provide training to educators and school leaders on their use	Principal and Academics	June 2023 – July 2023
Work with educators to provide professional development around strategically unpacking standards	Principal and Academics	June 2023 – July 2023
Weave unpacking standards instructional practices into academic framework	Principal and Academics	June 2023 – July 2023
Finalize agreements with programmatic partners including wraparound student support service providers.	Principal and Academics	June 2023 – July 2023
Review, align and plan athletics programs and extracurricular options.	Principal and Academics	June 2023 – July 2023

Implement BOY NWEA assessments to establish scholar performance baseline and individualized academic growth goals	Principal and Academics	August 2023
Implement data-driven instruction that utilizes proficiency data strategically to make informed decisions and adjust instruction to support all scholars	Principal and Academics	August 2023 onwards
Maximize learning time to ensure scholars spend more time on-task and on core subjects	Principal and Academics	August 2023 onwards
Maximize learning opportunities for all scholars by differentiating and scaffolding instruction and providing small-group instruction	Principal and Academics	August 2023 onwards
Implement targeted, evidence-based interventions to meet the learning needs of scholars with deficits (Catch Up) and those that need to be challenged beyond grade level (Move Up)	Principal and Academics	August 2023 onwards
Design and implement instructional tasks that require higher-order, complex thinking	Principal and Academics	August 2023 onwards
Community Engagement		
Identification and cultivation of community partners including service providers based on school need	Principal and Communications	January 2023 – May 2023
Draft staff and family welcome letter with FAQs as well as press and community letters	Principal and Communications	January 2023 – May 2023
Release family and community messaging, as well as staff welcome, meet & greets and surveys	Principal and Communications	January 2023 – May 2023

Host family and community events including virtual and in-person townhalls, meet & greets, and more	Principal and Communications	April 2023 – July 2023
Provide training opportunities to educators, emphasizing positive family and community engagement as a key component	Human Assets	April 2023 – July 2023
Provide PD sessions to school leaders, coaching them on strategies to effectively secure and retain families and community partners	Human Assets	April 2023 – July 2023
Finalize MOUs and agreements as needed with key community partners and service providers	Principal and Legal	April 2023 – July 2023
Use data-driven systems to conduct targeted scholar recruitment and enrollment campaigns in the community	Principal and Enrollment	January 2023 – May 2023
Support enrollment campaigns with multi-pronged media strategy including TV, social media, radio, inbound calls, flyers, community events and formal as well as informal outreach	Communications and Enrollment	March 2023 – May 2023
Finalize plan for summer engagement of prospective families and community partners including community events and a data-driven framework for securing and processing scholar enrollment applications	Principal and Enrollment	March 2023 – May 2023
Secure and process family enrollment applications	Enrollment	April 2023 – July 2023
Send welcome packets to newly enrolled families with school information	Enrollment	June 2023 – July 2023
Submit to Authorizer any documents pertaining to enrollment lotteries held and keep on file	Enrollment	August 2023
Submit to Authorizer enrollment stats, including number of enrolled students, number of students on waiting list, and student rosters by grade level	Enrollment	August 2023

Host open houses and welcome events for new families (e.g., ice cream socials, parent nights etc.)	Principal and Enrollment	August 2023 onwards
Conduct year-round family engagement including hosting monthly parent-teacher meetings, sending biweekly report cards to parents, conducting phone calls home to discuss scholar progress, engaging with families via social media platforms and sending out monthly parent and community newsletters	Principal	August 2023 onwards
Legal and Compliance		
Submit student enrollment policy to Authorizer, including enrollment deadlines, capacity by grade level, limitations per state law, and lottery process	Enrollment	January 2023 – May 2023
Submit written policies/procedures to Authorizer for services to SPED students, student discipline, grievances, FERPA, and state Public Access laws	Legal and Compliance	January 2023 – May 2023
Update Student and Family Handbook with above policies (including suspension/expulsion, school health records, and Board Meeting policies)	Legal and Compliance	January 2023 – May 2023
Ensure Staff Policies & Procedures Manual (SPPM) is aligned with IDEA/Article 7 in serving SPED students	Legal and Special Populations	January 2023 – May 2023
Ensure the school's health record procedures are included in the SPPM	Legal and Special Populations	January 2023 – May 2023
Ensure required staff procedures consistent with FERPA for storage/handling of student files are included in the SSPM; submit to Authorizer	Legal and Compliance	January 2023 – May 2023
Implement electronic system for maintaining student records	Principal and Legal	March 2023 – July 2023
Request and process student records, including immunization records/exemptions & records for students with special needs	Principal and Legal	March 2023 – July 2023

Secure student academic, attendance, discipline, test records, and (separately) health records in locked cabinets	Principal and Legal	March 2023 – July 2023
Provide written assurances to Authorizer regarding student records and electronic data system	Principal and Legal	March 2023 – July 2023
Ensure that master school year calendar and daily class schedule is available in both English and Spanish and distributed to all families	Principal and Communications	March 2023 – July 2023
Ensure that Student and Family Handbook is available in both English and Spanish and distributed to all families	Principal and Communications	March 2023 – July 2023
Operations		
Work with community partners to identify and secure facilities for school campuses	Operations	January 2023 – January 2023
Coordinate services with supplemental services providers and partners	Operations	January 2023 – June 2023
Create specific written plan for preparing and responding to emergencies; post copies in the school and submit to Authorizer	Legal and Operations	March 2023 – May 2023
Ensure that Department of Public Works has installed school zone and speed limit signs	Operations	March 2023 – May 2023
Finalize food vendor and transportation services contracts per IDOE requirements; submit to Authorizer	Operations	April 2023 – May 2023
Obtain copies of expanded background checks for employees of supplemental service providers; submit to Authorizer	Human Assets	April 2023 – May 2023
Coordinate appropriate state and local health department inspections and licenses; ensure compliance and submit to Authorizer	Operations and Legal	May 2023 – June 2023
Submit to Authorizer agreement with transportation provider regarding homeless	Operations	May 2023 – June 2023

students and students with transportation accommodations		
Provide Authorizer with written assurance that updated school administration contact information has been provided to the state	Legal and Compliance	May 2023 – June 2023
Submit written plan to Authorizer for medication administration and provision of required health services (student hearing and vision)	Operations	May 2023 – June 2023
Submit to Authorizer evidence that health services are available (e.g., school nurse on staff or contract, contract with health care clinic)	Operations and Compliance	June 2023 – July 2023
Finance		
Create operating budget for school	Finance	January 2023 – March 2023
Establish school bank account	Finance	January 2023
Submit to Authorizer documented fiscal management policies and accounting system with internal controls; keep on file	Finance	February 2023 – April 2023
Provide to Authorizer evidence of employment of accountant	Finance	February 2023 – April 2023
Provide Authorizer with a copy of the initial statement adopted by the Board of Directors	Finance	February 2023 – April 2023
Provide written assurance to Authorizer that schools have contracted a Certified Public Accounting firm to complete Independent Accountant's Report	Finance	February 2023 – April 2023
Provide Authorizer with a copy of deduction policy and proof of contract with payroll company	Finance	February 2023 – April 2023
Develop and review cashflow framework for the school	Finance	March 2023 – May 2023

Confirm all funding sources	Finance and Development	May 2023 – July 2023
Pre-Opening Site Visit		
Submit a letter of assurance to Authorizer, signed by the Board Chair and School Leader, stating that all Prior Actions are complete	Operations	June 2023
Host pre-opening site visit	Principal	July 2023
Anticipated Opening		
School Opening	All Staff	August 2023

PHALEN LEADERSHIP ACADEMIES GOVERNING BOARD

Proposed Resolution Number: 2022_071922_1

Subject: PLA's Approval to Activate Unused Charter Contracts to Open in SY 2023-2024

Whereas, Phalen Leadership Academies ("PLA") has un-activated charters through Indiana Charter School Board ("ICSB"), the Governing Board desires to activate two approved charter contracts. Upon activation, said school shall open during the 2023-2024 school year.

Whereas, the Governing Board of PLA seeks to serve the needs of scholars and families throughout Indiana, the Board believes that opening additional charter schools within the Indianapolis region, will support the educational advancement of scholars in furtherance of PLA's mission and vision.

NOW, THEREFORE, IT IS RESOLVED, the Governing Board moves to approve activation of two charter schools for opening in school year 2023-2024.

_____
Name: Earl Martin Phalen
Title: Board Member

September 7, 2022

Ariana Beedie
615 Ingomar St
Indianapolis, IN 46241

Hello,

My name is Ariana Beedie, I am a community organizer in Indianapolis. I spent some of my formative years in Pike/Westside and had a very positive experience. I also believe that multiple school choice options can be beneficial. The commitment PLA has to ensure excellence in the lives of their students is extremely important while meeting their unmet needs. They are working to create the conditions to honor our students' potential.

PLA's signature programs such as Reading Advantage, Math Advantage, and Summer Advantage are great ways to add value to the community. I truly appreciate their approach to serving students holistically. In response to the rising tide of violence in Indianapolis and the desperate need for safe spaces to support their students, families, and community, PLA began building the Sean Cowdrey Health and Wealthness complex. They also have the Phalen Cultural Center that exists to educate, inspire and empower students, families, and organization partners in the Far Eastside community and large through embracing performing arts and other mediums as a form of communication and connection.

They are committed to maintaining a high-quality educational environment for their students and supporting them holistically through health and wellness. I support their desire to reactivate their charter to potentially start a school in our community that can create more options.

Sincerely,

Ariana Beedie

September 15, 2022
Cassandra Goehring
10998 Windjammer Trace
Indianapolis, IN 46256

Dear To Whom It May Concern,

My name is Cassandra Goehring, an English language educator that works across the Pike/ Westside community. I have deep experience working directly with Promise Prep, a Phalen network school. Supporting them with the English language learners student population. The commitment PLA has to ensure excellence in the lives of their students is extremely important while meeting needs. They are working to create the conditions and be inclusive to honor all students.

PLA's signature programs such as Reading Advantage, Math Advantage, and Summer Advantage are great ways to add value to the community. I truly appreciate their approach to serving all students holistically, in particular students with language barriers.

They are committed to maintaining a high-quality educational environment for their students and supporting them holistically through supporting their unique potentials. I support their desire to reactivate their charter to potentially start a school in our community that can create more options.

Sincerely,

Cassandra Goehring

Cassandra Goehring

September 13 2022
Jose Uribe
8936 Summer walk Dr

Dear To Whom It May Concern,

My name is Jose Uribe, I am an educator and business owner that works with schools throughout Indianapolis. I have experience working directly with Promise Prep, a Phalen network school. The commitment PLA has to ensure excellence in the lives of their students is extremely important while meeting their unmet needs. They are working to create school options that honors our students' potential.

PLA's signature programs such as Reading Advantage, Math Advantage, and Summer Advantage are great ways to add value to the community. I truly appreciate their approach to serving students holistically.

They are committed to maintaining a high-quality educational environment for their students and supporting them holistically through health and wellness. I support their desire to reactivate their charter to potentially start a school in our Lawrence/Pike community that can create more options.

Sincerely,

Jose Uribe

September 15, 2022

Kim Kenny llc., Indy Urban Youth
3500 DePauw Blvd
Indianapolis Indiana
46268

Dear To Whom It May Concern,

I am writing on behalf of Phalen Leadership Academies in support of a proposal for a Charter
School in the Pike community because I believe that the PLA network is positively impacting the
community and the lives of the students and their families.

My name is Kim Kenny Green and I am the CEO of Indy Urban Youth. Indy Urban Youth
inspires young artists through a quality music education program. We believe in empowering
students through the use of artistic excellence in performance and nurturing their creative ability
in a safe and positive learning environment.

I truly appreciate their approach to serving students holistically. They have the Phalen Cultural
Center that exists to educate, inspire and empower students, families and organization partners in
the Far Eastside community and large through embracing performing arts and other mediums as
a form of communication and connection.

They are committed to maintaining a high-quality educational environment for their students and
supporting them holistically through the arts. I support their desire to reactivate their charter to
start a school in our community.

Sincerely,

Kim Kenny Green B.A.,M.M

August 29, 2022
Carolina Figueroa
Address 2707 Pawnee dr.
    Indianapolis, IN 46229
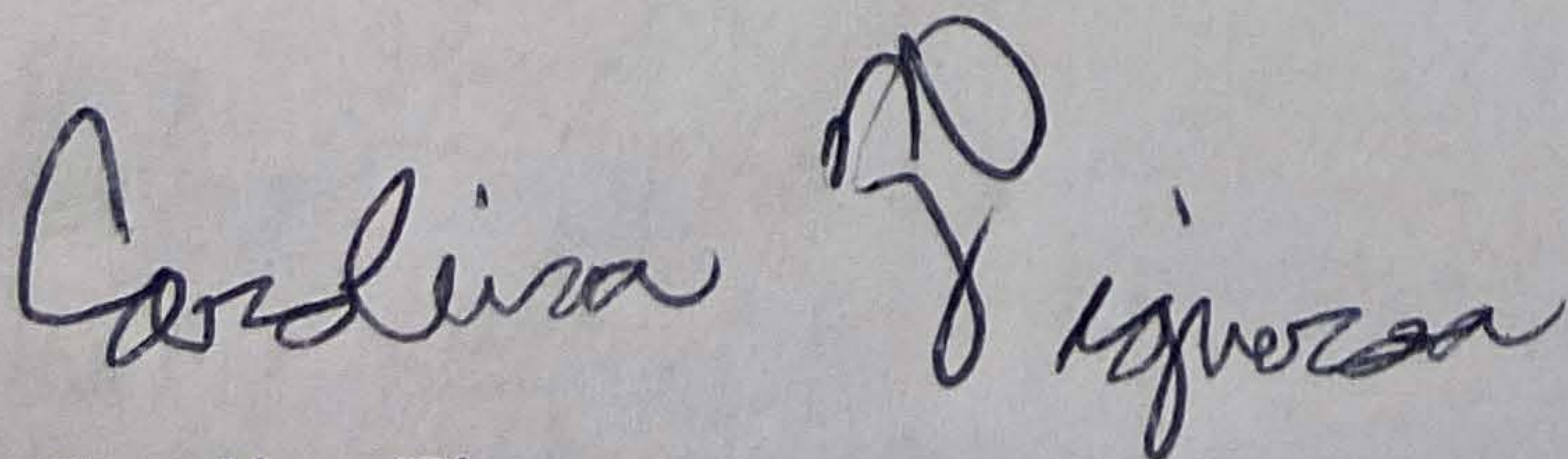
Dear To Whom It May Concern,

I am writing on behalf of Phalen Leadership Academies in support of a proposal for a Charter School in the Pike community because I believe that the PLA network is positively impacting the community and the lives of the students and their families.

My name is Carolina Figueroua and I am the leader of Naptown United, a non-profit geared toward creating an inclusive environment that fosters accessible social and emotional learning by leveraging community assets and resources through the beautiful game of soccer in Indianapolis.

PLA's signature schools and programs like PLA University, Reading Advantage, Math Advantage, and Summer Advantage have a transformative impact on students academically. However, I truly appreciate their approach to serving students holistically. In response to the rising tide of violence in Indianapolis and the desperate need for safe spaces to support their students, families, and community, PLA began building the Sean Cowdrey Health and Wealthness complex. The complex aims to foster a safe and nurturing environment for children and their families through a multigenerational approach focusing on leadership, health, wellness, teamwork, and character development.

They are committed to maintaining a high-quality educational environment for their students and supporting them holistically through health and wellness. I support their desire to reactivate their charter to start a school in our community.

Sincerely

Carolina Figueroua
Naptown United