

Exhibit B

**Proposal Overview**

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

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

Name of proposed Charter School: Vanguard Collegiate of Indianapolis  
Proposed Charter School location:\* Indianapolis, IN 46222

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

School district of proposed location: Indianapolis Public Schools  
Legal name of group applying for Charter: Vanguard Collegiate of Indianapolis, Inc.  
Designated representative: Robert Marshall  
Contact Information (Phone & Email): (317) 513-2128; rmarshall@buildingexcellentschools.org  
Planned opening year for the school: 2018-2019  
Model or focus of proposed school:  
(e.g., arts, college prep, dual-language, etc.) Vanguard Collegiate will be a college preparatory middle school.

**Proposed Grade Levels and Student Enrollment**

Indicate the grade levels the school intends to serve. Specify both the planned and maximum number of enrolled

Will an application for the same charter school be submitted to another authorizer in the near future?

Yes  No

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

Planned submission date(s): N/A

Please list the number of previous submissions (including withdrawn submissions) for request to authorize any charter school(s) over the past five years, as required under IC § 20-24-3-4.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

Authorizer(s): Indiana Charter School Board

Submission date(s): September 6, 2017

For Experienced Operator Applications:

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

If Yes, please provide the following information:

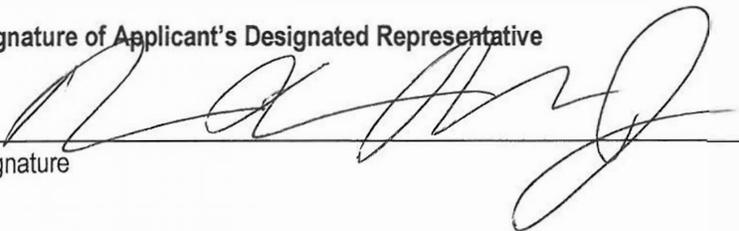
Identify the ESP or partner organization. N/A

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

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

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

Signature of Applicant's Designated Representative

 \_\_\_\_\_  
Signature Date



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

**Vanguard Collegiate of Indianapolis Charter School**  
A proposed 5-8 school for Indianapolis' Near Northwest side

Respectfully submitted by Robert Marshall  
on behalf of the Founding Team

September 6, 2017

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## EXECUTIVE SUMMARY

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**Mission.** Unapologetically focused on the academic success our scholars, Vanguard Collegiate of Indianapolis educates 5-8th grade students through high-quality instruction, rigorous curriculum, and character development to succeed in college and become leaders in thought, word, and action.

**Vision.** Through rigorous curriculum that efficiently addresses deficiencies and accelerates learning to grade level standards, meaningful and quality instruction that follows a clear scope and sequence that leads to a college preparatory high school course of study, and character development that focuses on values that lead to lives of leadership for every student, Vanguard Collegiate of Indianapolis (“Vanguard Collegiate”) will provide an academically challenging, data-driven curriculum and a structured, goal-oriented school community for 5<sup>th</sup> through 8<sup>th</sup> grade students. The Board, school leadership, and staff will ensure the highest academic achievement results for scholars, with a prioritized focus on literacy and math so that they are set up for success, regardless of the academic gaps with which they arrive. We ensure scholars are equipped for post-secondary education and subsequent life success regardless of race, socio-economic status, family educational attainment level, or zip code.

Vanguard Collegiate exists to educate Central Indiana students, more specifically those residing on the Near Northwest side of Indianapolis. Using curriculum and frequent rigorous assessments all aligned with national and state standards, and which together drive our professional development, instruction, and supports, our scholars’ level of mastery will consistently exceed city and state assessment averages. Scholars will receive intervention and college preparatory advisory supports to ensure they are on a high school and college success trajectory. We will hire, train, and retain highly effective instructors committed to growing scholars’ academic endurance, work ethic, and discipline, and deliver results. Vanguard Collegiate will equip scholars with critical thinking skills, integrity, and sense of social and personal responsibility necessary to seize the educational opportunities afforded them, thus, bringing their dreams and those of their families to fruition. Every day, our core values will drive the culture of the school: Team, Hard Work, Integrity, Nobility, and Knowledge.

**Educational Need and Target Population.** Vanguard Colligate is unapologetically focused on the success of 5<sup>th</sup> through 8<sup>th</sup> grade students in Indianapolis, and specifically on those residing within the 46222 zip code. Although school options for families have grown within Indianapolis, there are still challenges concerning quality education access for all students and chronic student academic performance gaps, particularly for African American, Latino, and impoverished communities within these zip codes. In zip code 46222, 10% of the population have a bachelor’s degree or higher, 63% have a high school diploma, and 27% do not have a high school diploma. Here, the unemployment rate is 17% and average household income is \$25,000. Demographically, the community is comprised of 34,000 residents: 40% Black, 35% White, and 23% Latino. As of 2014, there were 2,928 students ages 5-9 and 1,988 ages 10-14 within this zip code. Of the eight schools in 46222, there are three charter schools.<sup>1</sup> In 2015, all the schools earned failing grades on the ISTEP exam, with a 52% passage rate being the highest. Only two schools earned an “A” from the Indiana State Department of Education (Cold Spring School and Ernie Pyle School IPS #90). There are three K-8 schools here; however, there are no stand-alone middle schools in 46222.<sup>2</sup>

Although Indiana has made progress in resolving its challenges with quality education access, student academic performance gaps, diversity, and high crime, currently, there are no college preparatory middle school options for the students in zip codes 46222, nor are there any Indiana Department of Education A-rated middle school options for students residing here. As new school options emerge, so, too, do opportunities to make strong choices that will positively impact some of our most vulnerable students’ academic trajectory. In the time we have spent with the Haughville community, speaking with families, connecting with leaders, their message has been clear: they care deeply about the education of their children

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<sup>1</sup> <http://www.savi.org/savi/>

<sup>2</sup> <http://www.doe.in.gov/accountability/find-school-and-corporation-data-reports>

and are seeking a high-quality school option, and they fully support Vanguard Collegiate of Indianapolis.

**Community Engagement.** Vanguard Collegiate proposes to be a school that does something special with a community and not something to a community. We have engaged with a variety of community stakeholders, including neighborhood association leadership, elected officials representing the Westside, local churches, and hundreds of community members. We have engaged parents with students currently within the age range of the students we seek to educate and parents of potential students. From these conversations, we have identified three core needs of the community that have impacted the school design.

**Need 1: Academic Improvement.** Parents are genuinely excited about the idea of a college preparatory, expanded middle school education for their students. For many, college did not seem to be a reality for their children until we explained the impact middle school education has on their trajectory later and how every scholar will receive an individualized college success plan that outlines how they can achieve high school success and attend the college of their choice. **Need 2: Character Development.** We have sharpened our vision for character development, and incorporated community input into the selection of our core values. **Need 3: Safety.** Our culture of success establishes structures that ensure all students are physically, emotionally, and intellectually safe, establishes a school in which learning time is sacred, and anticipates/prepares for the most challenging situations and conditions.

Vanguard Collegiate is deeply committed to teaching the principles of service learning to our scholars. Our scholars will be required to complete a Community Health and Impact Project in Neighborhoods (“CHIP - IN”) as their capstone and as a graduation requirement. In their eighth grade year, students with the support of their teachers will be responsible for successfully implementing their project, carefully managing the progress of their plans/timelines, and adjusting as needed. At the end of their project, scholars will complete an evaluation of their project that will highlight success, lessons learned, and demonstrate the need met and will culminate their work through presentation to the school and community stakeholders.

We believe firmly in both our commitment to the community as well as to the families of our students. “A successful school is marked by parents committed to academic excellence. A lack of parental involvement, however, is no excuse for a school’s poor performance.”<sup>3</sup> We will engage families proactively and we will always set the bar high, even when families may struggle to be involved. Vanguard Collegiate sees every student’s education as a partnership between the school, students, and their respective families. Students with parents and a school community that have high expectations for their academic performance generally exceed expectations.<sup>4</sup> The cornerstone of our partnership with families is clear and consistent and communication. This partnership begins with annual In-Home Conferences conducted by school staff, annual family orientations, and regular academic reports, and extends to student and family school events offered throughout the school year.

**Education Plan/School Design.** We reach our ambitious mission through (1) Quality Instruction and Rigorous Curriculum, (2) Student Supports, (3) Culture of High Expectations, and (4) Core Values. “Creating an environment in which you can’t imagine students not trying their best, in which semi-correct answers will be teased out until they are fully correct, in which correct answers will be met with rigorous follow ups, and in which content and format will be held to unapologetically high standards creates a powerful ethos in champion classrooms.”<sup>5</sup> We believe unequivocally that all children can achieve academically at high levels regardless of their race, socio-economic status, family educational attainment level, or zip code. Closing Indiana’s college completion gap (27% on-time completion for all students, and 11% for Black students) begins before students enroll in post-secondary education, and includes prioritized attention in the middle school grades.<sup>6</sup> Per the National Assessment of Educational Progress report, a study

<sup>3</sup> Carter, Samuel Casey. *No Excuses: 21 Lessons from High Performing, High Poverty Schools*. Heritage Foundation. 2000.

<sup>4</sup> Benner, A. & Mistry, R. “*Congruence of Mother and Teacher Educational Expectations and Low-income Youth’s Academic Competence*.”

<sup>5</sup> Lemov, Doug. *Teach Like a Champion 2.0 : 62 Techniques That Put Students on the Path to College*. San Francisco :Jossey-Bass, 2015.

<sup>6</sup> Indiana Commission for Higher Education. “*Reaching higher, Delivering Value*.” 2016.

conducted between 2003 and 2009 shows that “goal setting and accountability, curriculum and instruction, teaching quality, and use of data assessments” are among the shared traits of high performing school districts.<sup>7</sup> To ensure students are on this path to college completion, Vanguard Collegiate focuses first on academics and high-quality instruction, starting in grade five.

**(1) Quality Instruction and Rigorous Curriculum.** Vanguard Collegiate will have a college preparatory curriculum in all grades and all content areas aligned with the Indiana State Standards and ensures implementation of College and Career Ready standards and skills. From these standards, Vanguard Collegiate will create our own interim and end-of-course assessments and backwards plan courses to the level of rigor expected on college-ready assessments. Daily lessons, daily homework, weekly quizzes, and unit assessments will all drive towards these interim and end-of-course assessments, and set students up for success through a carefully scaffolded course of study.

Teachers will be supported in holding students to a high bar for their responses, written and verbal, and will be trained to use targeted questioning techniques to push students to higher order thinking and critical analysis. Students will be required to explain their thinking in written and verbal responses and to robustly support their claims with evidence. In Literacy, students will read and analyze grade level and above grade level texts. They will engage in written responses and verbal discussions to proficiently analyze these texts, as a class and independently. Students will be expected to read a wide variety of literature, ranging in complexity and genre. In mathematics, students will develop grade level mastery in number sense, computation, algebra, geometry, measurement, data analysis, and statistics. In 8<sup>th</sup> grade, all students will take Algebra 1, setting them on the path to a high school course of study in math that will lead to college readiness. Daily, scholars will be challenged to demonstrate academic skills coupled with our core values.

**(2) Robust Student Supports.** We recognize that students will enter school with a wide range of academic proficiency. We will ensure students receive the necessary supports to reach our rigorous goals through detailed analysis of our assessment data and clear action plans informed by that analysis. To supplement classroom instruction, we will incorporate an hour of literacy support and an hour of math support daily, as both a Reading and a Math Power Hour. During each Power Hour, students will be strategically placed in small groups based on skill, and groups will rotate through a station rotation model. Scholars will receive small group instruction directly from teachers and work independently on their own level and at their own pace using research-based, blended learning platforms. We will use a Response to Intervention (RTI) model to identify individual student needs, including but not limited to, English Language Learners and Special Education students, and we will provide the necessary services specified in the Every Student Succeeds Act of 2015.<sup>8</sup> Our extended school day (8.5 hours) allows for extended time for both literacy (160 minutes daily) and math (110 minutes daily), as well as a daily tutoring period – all critical to our students’ success and changing academic outcomes in our community that remain chronically low.

Outside of the classroom, we recognize that our students will have other needs, as research demonstrates for students coming from low-income backgrounds. The school community will partner with outside service providers to create supports for students so that they are able to thrive academically. We plan to partner with Adult&child Health to support with student mental health services as well as other local organizations. All partnerships will be strategically developed to ensure every student can meet and/or exceed the school’s academic expectations.

**(3) Culture of High Expectations.** A school grounded in a culture of respect, structure, and high academic and behavior expectations sets students on a path to high school, college, and life success. Vanguard Collegiate will provide an environment that is structured and supportive where students and staff alike are respected. Behavior expectations will be communicated clearly and enforced consistently, to maximize instructional time. Teachers and administrators will “sweat the small stuff” because the details are in the

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<sup>7</sup> Casserly, Michael. "Pieces of the Puzzle: Factors in Improving Achievement of Urban School Districts." American Enterprise Institute for Public Policy, Volume 4, 2012, 5.

<sup>8</sup> <http://www.rtinetwork.org/learn/what/whatisrti>.

small stuff and excellence - the bar to which all Vanguard Collegiate students aspire - is in the details.

In *Nothing's Impossible*, nationally recognized educational leader Dr. Lorraine Monroe writes that order and stability facilitate learning by reducing the amount of teaching time misplaced to non-academic matters.<sup>9</sup> Vanguard Collegiate will provide a highly structured, disciplined, and supportive learning community coupled with high-quality instruction delivered by mission-driven and well-trained educators so that students can achieve the highest academic results.

**(4) Core Values.** Our values of **THINK** - Team, Hard Work, Integrity, Nobility, and Knowledge - will guide students and staff in all aspects of school life. Beginning with morning motivation, our core values will be reinforced throughout the school day and year. These values will be connected to all community/academic infractions, rewards, consequences, awards, and restitutions, and will be modeled by our staff. Each month, we will focus on one value and that value will drive school wide activities.

Our students will also be required to complete individual success plans for middle school, high school, and college. The success plan will be a living document that mirrors details and information required in the college application process. Success plans will include: any certifications and/or awards a student has earned; a map of the classes they need to take each year in high school to graduate on time with an honors diploma; a chart of supplemental programs they should participate in based upon both their gaps and interests; and basic information (location, enrollment requirements, student populations, etc.) of the student's top five college choices. The plan will be developed in students' 8<sup>th</sup> grade year in partnership with their teachers and the Dean of Students. Vanguard Collegiate students will be poised to compete academically for excellence against the top schools in Indiana and nationally.

**Innovative Elements.** Vanguard Collegiate's model differs from a traditional school model as it includes: (a) extended school day; (b) expanded time in English language arts and Math; (c) blended learning; (d) character development; (e) service learning curriculum and Capstone Projects; (f) college preparedness plan for every student; and (g) daily tutoring to support academic growth.

**Vision for Growth.** Vanguard Collegiate will open as an expanded middle school in the fall of 2018 with 120 students, 60 fifth and 60 sixth grade students, and will add one grade level at a time, until the school has reached full enrollment with 480 students in 2022. Using a slow growth model will allow the school to strategically bring students into the culture, processes, procedures, and academic rigor necessary for their academic and behavioral success. Additionally, this approach to school growth will allow for development of a strong professional development program necessary for our teachers' success across grades and content areas. Beginning in 2018, Vanguard Collegiate will enroll 60 students in each of two grades in our first year of operation to ensure we reach full enrollment; we will then expand the size of our fifth grade, and thus all future grades as they grow out, to 120 students per grade each year thereafter. As the school grows, it will be divided into academies – Lower (fifth and sixth grades) and Upper (seventh and eighth grades). The Lower Academy's primary focus will be to help students build fundamental academic skills, narrow and close their academic gaps, and enculturate scholars into the Vanguard Collegiate way. The Upper Academy will focus on higher order thinking skills, academic and social preparation for high school, and every student meeting or exceeding grade level proficiency in both Math and ELA.

### **Governance and Leadership**

Vanguard Collegiate's Founding Team consists of a group of high-capacity, proven community leaders and the Lead Founder, Robert Marshall, a Building Excellent Schools Fellow—all of whom are dedicated to the mission of Vanguard Collegiate and to the development of a school that will provide a quality option that middle school students in Indianapolis need to be prepared for high school and college success. Working with the understanding and firm belief that all students can learn and succeed regardless of their socioeconomic status, home situation, or community challenges, the Founding Team has devoted its time, talent, and expertise to provide a college preparatory academic experience to students of the Near

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<sup>9</sup> Monroe, Lorraine. *Nothing's Impossible*. NYC. 1999.

Northwest side of Indianapolis. The Board of Directors is comprised of members who work in and/or have experience and expertise in Education, Finance and Accounting, Law, Governance, Facilities and Real Estate, Community Outreach, Strategic Planning, Technology, Executive Leadership, and Marketing and Communications.

### **Members of the Founding Team**

- **Asia Barte**, HR Manager, Johnson Controls
- **Molly Chamberlin**, Vice President, Thomas P. Miller & Associates
- **Sibeko Jywanza**, Director, Marion County Youth Advocate Program
- **Dan Levine**, IT Vendor Manager, Herff Jones
- **Robert Marshall**, Lead Founder and proposed Executive Director, Building Excellent Schools Fellow
- **Damon Martin**, Director of Talent Management Strategy, One America
- **Juan Pablo Roman-Lagunas**, Partner, Roman-Lagunas & Wheeler, LLC
- **Tonya Taylor**, Director of Special Education, Purdue Polytechnic High School
- **Nakeisha Williams**, Science Teacher, Lawrence Academy

The Board of Directors of Vanguard Collegiate will serve as the school’s governing body, overseeing fulfillment of the school’s mission and its promises to the authorizer and to our community in general, and most importantly to our students and their families specifically. The Executive Director—to be hired by, report to, and be evaluated by the Board—will manage the daily operations of the school. The Board will elect a Chair, Vice-Chair, Treasurer, and Secretary. The creation and diligence of standing board committees, including Governance, Finance, Academic Achievement, and Development, will ensure that the Board is strategically structured to oversee, support, and hold accountable the work of the school and that the Board is best positioned to make informed decisions. Board training is facilitated by the Chair of the Board, Executive Director, Building Excellent Schools, and outside partners. In addition, the Board will participate in an annual retreat to reflect on and strategically plan for the coming year.

## **SECTION 1: EVIDENCE OF CAPACITY**

**1. Founding Team Members.** The Founding Team includes nine (9) stakeholders committed to and united by the mission of Vanguard Collegiate. Eight members intend to serve on the Governing Board; one member we intend to name as our founding Executive Director. All Founding Team members have reviewed, contributed to, and supported all components of the charter application and school design.

**Founding Board Member Asia Bartee** is HR and Business Process Excellence Manager at Comcast. With 10+ years of human resources experience, Mrs. Bartee has expertise dealing with labor and employment law compliance, labor and employee relations, HR strategic planning, and executive professional and leadership development. Mrs. Bartee has diligently served the Indianapolis community by serving as the Operations Director and Board Liaison for Bloom Project, Inc., a local nonprofit organization that provides academic and collegiate opportunities to local students. Through this work, she has created and managed programs and events that support academic excellence for 200+ youth annually in the Indianapolis and Ft. Wayne communities. Mrs. Bartee holds a B.S. in Human Resources and M.B.A. in Human Resource Management. Mrs. Bartee's key contributions to the Board will be in the areas of human resources and community engagement. Mrs. Bartee will serve as the founding Secretary and as member of the Governance and Facilities Committees. **Founding Board Member Molly Chamberlin** is Vice President at Thomas P. Miller and Associates, an international consulting firm in Indianapolis. Dr. Chamberlin has an extensive background in evaluation, research, and policy, in the areas of K-12 and higher education. In her current role, she oversees a team of consultants who provide support for state government entities, institutions of higher education, non-profit organizations, and private businesses in research, evaluation, and economic development. She has served as Chief Assessment and Accountability Officer for the State of Indiana, where she had responsibility for promoting alignment across K-12, higher education, and the workforce with regards to accountability, assessment, and data. Dr. Chamberlin has worked with research and program evaluation in a variety of capacities, including federal and state programs and for-profit and non-profit organizations. She holds a B.A. in Liberal Arts from Middlebury College and Ph.D. in Educational Psychology from Indiana University, Bloomington. Dr. Chamberlin's key contributions to the Board will be in the areas of leadership, administration, curriculum, instruction, assessment, and performance management. She will serve as the founding Board Chair and as member of the Governance Committee. **Founding Board Member Sibeko Jywanza** is currently the Director of Food Justice at the Flanner House, and was the former Program Director for the Marion County Youth Advocate Program (YAP). Mr. Jywanza provided direct service to and advocates for young men and women in jeopardy of being placed in the Department of Corrections or residential facilities by developing an action plan that allowed them to be released to a parent or guardian with community support. He is passionate about serving the Indianapolis community, demonstrated by his servant leadership to numerous groups including the Indianapolis Kwanzaa Committee and the Indianapolis Urban League's The Exchange Young Professional Group. Mr. Jywanza earned a B.S. in Business Administration from Florida A & M University School of Business and Industry (SBI). Mr. Jywanza is a resident of the target area of Vanguard Collegiate, zip code 46222. His key contributions to the Board will be in the areas of marketing, parent advocacy and engagement, and community engagement. Mr. Jywanza will serve on the Facilities and Development Committees. **Founding Board Member Dan Levine** is the IT Vendor Manager at Herff Jones. As a seasoned executive that worked for companies including Office Depot, Thomson, Cummins, and Finishmaster with 25+ years in the purchasing industry, Mr. Levine has extensive background in strategic and tactical planning, project management, and budgeting, and his experience spans retail, manufacturing, construction, real estate, human resources, and IT. Mr. Levine is active in the community, and currently serves on the Board of Lilly Boys and Girls Club of Indianapolis and the Indiana Addictions Issues Coalition. Previously, he was on the Board of the Institute of Supply Management of Indiana. Mr. Levine has a B.A. in Human Resource Management from Palm Beach Atlantic University. He will bring expertise in human resources and board governance to the Board of Directors and will serve on the Finance, Development and Facilities Committees. **Proposed Executive Director Robert Marshall** is a Building Excellent Schools (BES) Fellow. Mr. Marshall brings a breadth of human services and program management experience to the Fellowship as he sets out to found

and lead Vanguard Collegiate. A native to Indianapolis, Mr. Marshall is committed to ensuring high quality public education options for minority and under-served youth in our city. His career began in program management largely focused in youth development. With a deep concern for the achievement gap experienced by so many of our children, he has approached every challenge with the goal of leveling the playing field. Having held leadership positions in organizations such as 100 Black Men of Indianapolis and the Boys and Girls Club of Indianapolis, Mr. Marshall has been an integral part of large fundraising initiatives, strategic plan development, and volunteer management. Most recently, he worked as the Senior Director of Programs at the Center for Leadership Development, and managed programs supporting the advancement of minority youth in Central Indiana as future professional business and community leaders. As a Fellow with Building Excellent Schools, Mr. Marshall has studied and deeply analyzed best practices of over 40 high performing urban charter schools and has received extensive development in the areas of organizational development, instructional design, charter accountability, and leadership. Mr. Marshall received his B.A. in Political Science and Law from Morehouse College. We intend Mr. Marshall to serve as our founding Executive Director. **Founding Board Member Damon Martin** is the Director of Talent Management Strategy at OneAmerica and is responsible for transforming the organization's ability to attract and retain in-demand talent through transforming, people, processes, and technology. Prior to joining OneAmerica, Mr. Martin spent nine years with Indiana University Health and held several other leadership roles within financial services organizations including banking, brokerage, and financial sales. He supports the community in several ways, including as a past Vice President of Circle City Frontiers, a Board Officer for EmployIndy, and as member of the Hispanic Business Council. Mr. Martin holds a B.S. in Communications and minor in Economics from Indiana University-Indianapolis and M.B.A. from Indiana Wesleyan University. He also holds a Green Belt certification, an industry recognized certification for professionals who are well versed in Lean Six Sigma Methodology. Mr. Martin's key contributions to the Board will be in the areas of leadership, financial and business management, and nonprofit governance; he will serve as the founding Treasurer and lead the Finance Committee. **Founding Board Member Juan Pablo ("JP") Roman-Lagunas** is owner/operator of Roman-Lagunas & Wheeler, LLC, a multi-faceted, multi-lawyer, full-service law firm that represents businesses and individuals in a variety of disciplines. He is an active advocate for the underprivileged and dedicates an average of 75 hours annually to pro-bono work, as well as representing individuals as conflict counsel for the Marion County Public Defender Agency. He is admitted to practice before the Indiana Bar and the United States District Courts for both the Northern and Southern Districts of Indiana. Mr. Roman-Lagunas earned a B.A. in International Relations, Spanish, and Communications from Purdue University and J.D. from Valparaiso University. Mr. Roman-Lagunas' key contributions to the Board will be in fund development along with legal and regulatory compliance, and will serve as the founding Vice-Chair and as member of the Governance Committee. **Founding Board Member Tonya Taylor** is Director of Special Education and Student Services at Purdue Polytechnic High School. She is an experienced educator with an extensive background in special education, administration, and teaching in schools such as Wayne Township (Indianapolis), Zionsville Community Schools, and Goodwill Education Initiatives. In her role at Purdue Polytechnic High School, Ms. Taylor oversees the Special Education, ELL, and Title I grant application process, ensures all services are being implemented to develop and deliver high quality services to students, and directs and advises school leaders on specific legal procedures, regulations, legislation, and programs that will guide all staff to mold the educational experiences of a diverse group of students. Mrs. Taylor earned her B.S. in Elementary Education from the University of Southern Indiana and M.A. in Special Education from Indiana University-Purdue University Indianapolis. She also holds a Director of Special Education License from Indiana University Bloomington and Administrative Certification/Principal License. Ms. Taylor's key contributions to the Board will be in special education regulation compliance, curriculum, instruction, assessment, and performance management and will serve as a member of the Academic Achievement Committee. **Founding Board Member Nakeisha Williams** is the Chief Science Instructor for all Sciences at Lawrence Advance Academy in Lawrence Township. As a 15-year veteran in education, she holds a Secondary Science Teacher's license and a K-12 Building- Level Administrator's license in Indiana, Florida, and Georgia. Ms. Williams serves as the Founder and Chief Executive Officer (CEO) of Nyla

Denaë' Enterprises, which provides outreach and educational programs to children. She served on the founding teams of Indianapolis Metropolitan Career Academies and Emma Donnan Middle School in Indianapolis under CharterSchoolsUSA. She was the Assistant Principal of Emma Donnan Middle School, where her responsibilities included, but were not limited to, staffing/onboarding, reporting to the Indiana Department of Education, community outreach, governance reporting, vendor management, student recruitment, and curriculum development. Ms. Williams earned a B.A. from Indiana University Northwest in Professional Human Resources and M.A.E. from Ball State University in Education Administration and Supervision. Ms. Williams will serve on the Academic Achievement Committee.

Board member resumes can be found in **Attachment 1**. Board member bios and Board Member Information Sheets can be found in **Attachment 2**.

**Development and Planning Partners.** Vanguard Collegiate has worked closely with several organizations who are leaders in their respective fields, and who all have provided knowledge and expertise to support in the planning process. Our primary partners are Building Excellent Schools, EdTec, IFF, EdFit, the Network for Quality Education, and Marion University's Educators College. **Building Excellent Schools.** Robert Marshall, Lead Founder and proposed Executive Director, is a Fellow with the national non-profit Building Excellent Schools. Over the course of an intense 12-month period, BES trains, mentors, and supports Fellows to study the highest performing schools, refine elements of their education and business plan, build a strong founding team, and garner wide community support. The BES Fellowship grounds participants in best practices around: organizational development, instructional design, charter accountability, and leadership. Through leadership residency in a high-quality urban charter school, ongoing evaluation and consultation, and training specifically focused on school leadership, BES Fellows are prepared to begin the work of running successful schools. **Attachment 1** outlines all the training sessions Mr. Marshall participated in as a Fellow. BES will provide ongoing support to Vanguard Collegiate for the planning year and minimally the first two years of school operation. **Attachment 1** displays a summary of the Follow-on Support Mr. Marshall will participate in provided by BES. In Year 0, some of the key elements of FOS are one-on-one leader coaching, monthly trainings/webinars, document review, and site visits. In Year 1 and beyond, some key elements of FOS are leader coaching, teacher coaching, assistance in the development and implementation of professional development, and systems audits. **EdTec.** Founded as a social venture in 2001 to develop, support, and advance quality charter schools by delivering high-value support services and expertise, EdTec works with over 300 charter schools, offering support in charter school development, finance, operations, governance, and software. Back-office clients receive a CFO-level resource to advise school leadership and specialists in Payroll, Accounts Payable, Accounting, and Data. EdTec also offers a wide range of financial services, including but not limited to, building annual projected budgets, managing monthly financial statements, managing payroll, identifying grant and funding opportunities beyond federal and state dollars, and providing other fiduciary services. **IFF.** Founded in 1988, IFF provides long-term financing for nonprofits' capital projects, real estate consulting and development, research and public policy, and community development. In 2015, IFF helped create 3,200+ student seats in quality schools, developed 1.5 million square feet of real estate, and created or maintained 3,700 jobs. To establish a location for Vanguard Collegiate, IFF will conduct a space planning needs assessment including demographic, market, and feasibility analysis, and a school site search and due diligence. IFF will serve as our primary facilities resource. **EdFit.** A nonprofit that works to ensure our most underserved students are afforded the tools necessary to fulfill their promise and become productive members of our community, EdFit is focused on promoting school community environments where all stakeholders demonstrate investment into our children through the introduction of and access to high quality educational options. The Board of Vanguard Collegiate will participate in the EdFit Leadership Series—an in-depth training around how to be an effective Board Member for Charter organizations/elected School Boards, Fundraising/Fund Development, and how to effectively advocate and articulate Education Reform to the local community. Board members participate in a four-session development and training program through EdFit. **Network for Quality Education.** The Network for Quality Education (NQE) is a membership organization that

works to scale, support, and service quality schools by serving as a “help desk” by keeping them informed of policy updates and operational issues. Resources provided by NQE include, but are not limited to, trainings/webinars, a state charter school conference, and vendor relationship building in media, facilities, academic improvement, fund development, real estate, and financing. **Marion University’s Educators College.** Since its founding as a teachers’ college nearly 80 years ago, Marian University has been developing leaders in education. The Educators College is committed to delivering graduating teachers who are (1) highly proficient in their content areas, (2) experienced in classroom delivery and management, (3) superior at relationship-building with students of all backgrounds and needs, and (4) values-oriented, passionate leaders who are proud to be called to teach.<sup>10</sup> In addition, they provide services to schools such as special education administrative support, professional development (leaders and teachers), and state reporting and compliance support.

**2. Qualifications of the Applicant Group** The Founding Team of Vanguard Collegiate brings a wealth of knowledge and expertise in Education, School Leadership, Governance, Human Resources, Finance, Fundraising, Law, Community Development, Marketing, Information Technology, and Management. Upon authorization, the group will transition to a Governing Board apart from Robert Marshall who will be hired as Executive Director. **Figure 1** displays expertise of the Founding Team.

**Figure 1: Founding Team Expertise**

Founding Team		
Team Member	Role	Expertise
Asia Bartee	Human Resources Manager, Johnson Controls	Community engagement, human resources
Molly Chamberlin	Vice President, Thomas P. Miller & Associates	Curriculum, instruction, and assessment, leadership and administration, and performance management
Sibeko Jywanza	Program Director, Marion County Youth Advocate Program	Parent and community engagement
Dan Levine	IT Vendor Manager, Herff Jones	Financial and business, facilities, governance
Robert Marshall	Fellow, Building Excellent Schools Lead Founder and Proposed Executive Director	School leadership and administration, performance management, human resources, fund development, fiscal management, and community engagement
Damon Martin	Director of Talent Management Strategy, One America	Financial and business, governance
Juan Pablo Roman-Lagunas	Partner, Roman-Lagunas & Wheeler, LLC	Legal and regulatory compliance
Tonya Taylor	Director of Special Education, Purdue Polytechnic High School	Curriculum, instruction, and assessment, school leadership and administration, Special Education, and performance management
Nakeisha Williams	Science Teacher, Lawrence Academy	Curriculum, instruction, and assessment, school leadership and administration, English Language Learners, and performance management

**3. Founding Team Resumes.** Please see **Attachment 1.**

**4. Governance Structure** The founding team at Vanguard Collegiate has come together with a deep commitment to the school’s mission and vision and upon authorization will govern the school to ensure management executes on the mission and vision and reaches the accountability goals set forth in this charter.

<sup>10</sup> <https://www.marian.edu/educators-college>.

Starting in October of 2016, Mr. Marshall began to assemble the Founding Team. Since December of 2016, the group has met monthly, engaged in extensive community outreach, and contributed to and reviewed the charter application. Vanguard Collegiate will be governed by a Board of Directors that will maintain active and effective governance to the school. The Board will ensure the school is held accountable to its mission including faithfulness to the charter, academic success, organizational health, financial viability, and regulatory compliance. The Board will set and approve policies including fiscal, personnel, and school policies that will, in turn, be executed and upheld by management.

The Board of Directors will consist of at least seven (7) and not more than fifteen (15) members. All members of the Board of Directors will be residents of the State of Indiana, and at least sixty percent (60%) of the members will be residents of the Indiana county where current students at the charter school reside. The Board of Directors will hold regular meetings including a standard monthly meeting, an annual meeting, special meeting(s), and as necessary emergency meeting(s), and will maintain an odd number of members for voting purposes.

The school will comply in all respects with the Indiana Open Door Law (currently codified at Indiana Code (“IC”) section 5-14-1.5, et seq.), and any corresponding provision of subsequent Indiana law, about all regular or special meetings of the Board of Directors. Written notice of the date, time, and place of each special meeting of the Board of Directors will be communicated, delivered, mailed, and/or posted online so that the public is notified at least forty-eight (48) hours before the date of the meeting and complies with the Indiana Open Door Law.

In accordance with its bylaws, the Board will elect officers: The **Chair** will preside over all meetings of the Board and is responsible for ensuring implementation of policies established by the Board of Directors. He/she will develop Board agendas, disseminate information to Board members, review and set organizational priorities in conjunction with the Executive Director, other officers, and Committee chairs. The Chair will appoint Committee chairs and will be responsible for the execution of the Board’s governing processes. The Chair will receive governance resources, webinars, and the option of 1:1 governance leadership coaching from Building Excellent Schools during the planning year and Year 1 of the school to ensure he/she is ready to be a powerful leader of the governance team responsible for oversight of the school. The **Vice Chair** will assist the Chair and preside in place of and assume the duties of the Chair at meetings in his/her absence. The Vice Chair will perform other duties as the Board of Directors or the Chair may prescribe. The Vice Chair will serve as an *ex officio* member of standing Committees, supporting Committee Chairs to drive organizational priorities and ensure governance concerns are addressed. The **Secretary** will be the custodian of all papers, books, and records of the Corporation other than books of account and financial records. The Secretary will prepare and maintain a record of the minutes of all meetings of the Board. The Secretary will maintain a hard and electronic copy of the most recent Board bylaws. The Secretary will send meeting notices and any other correspondence on behalf of the Board per Indiana Public Access Law. The **Treasurer** will prepare and maintain correct and complete records of account of the school. All notes, securities, and other assets coming into the possession of the school will be received, accounted for, and placed in safekeeping as the Treasurer may from time to time prescribe. The Treasurer will maintain checks distributed to the organization and will be responsible for drafting checks, where applicable, and until such time the organization appoints another individual to oversee these duties. He/she will be a designated cosigner of checks exceeding \$10,000. The Treasurer will serve as the Finance Committee Chair, reviewing monthly financial statements, ensuring timely and accurate preparation of financial reports, and reporting all financials to the Board. With the Finance Committee and on behalf of the Board, the Treasurer will oversee annual external financial audits to confirm compliance with local, state, federal, and other statutory reporting requirements and presents all findings to the Board.

The Board will have standing committees comprised of Board members working to ensure the effective oversight of the school. Each committee will formally report to the entire body at the Board’s monthly meetings. After authorization, BES staff will facilitate a Committee Action Planning Meeting, a full-day retreat where the focus is the establishment of Board Committees, design, codification and alignment of

goals to the Y0 strategic plan in support of the school, and the formalization of the board's annual calendar. Led by the Chair, the **Governance Committee** will oversee school and Board compliance with bylaws and other applicable legal regulations. It will be responsible for the development of a healthy Board, including but not limited to, membership and training. The Board will build and maintain members with as many areas of expertise as needed to govern effectively. Led by the Treasurer, the **Finance Committee** will have financial oversight responsibility for the school and the public dollars entrusted to it. The committee will work with the school's back-office provider and Executive Director to submit timely and accurate financial reporting to the Board. With management, the Finance Committee will be responsible for revising the school's annual budget and presenting it to the full Board for consideration and approval. Working alongside the Executive Director, the **Academic Achievement Committee** will be focused on academic outcomes. The committee will analyze academic performance data in comparison to local and national outcomes of similar schools and communities, as well as against the academic accountability goals established in the charter application. The committee will analyze data comprehensively, as well as specific to disaggregated groups such as, but not limited to, race, gender, socio-economic status, English Learners, and Special Education. Working with the Executive Director and Governance Committee, the **Development Committee** will seek additional financial resources to support the school's mission, enrichment programs, long-range goals, and scholarship support for students upon promotion from eighth grade. The committee will create and with board approval will implement a plan to secure private, corporate, and foundation funds. Once authorized, a **Facilities Committee** will be created to lead the process of identifying and procuring a facility and any supplemental work necessary for the inhabitation of said facility. This committee will stand until Vanguard Collegiate moves into a space and may be reconvened should another space become necessary. This committee will work closely with IFF and any selected vendors related to procuring a facility. The Executive Director will be responsible for the day-to-day management of the school, including hiring, developing, and managing staff, overseeing the academic program, and managing school funds. The Executive Director is hired and annually evaluated by the Board of Directors. The Board will continue to receive Board Governance training from Building Excellent Schools and will participate in any state-mandated board trainings. To date, all board members have received training and engaged in discussion around *Charter School Board University*<sup>11</sup> with focus on the differences between governance and management and the processes for ensuring accountability.

**5. Advisory Bodies** Vanguard Collegiate sees every student's education as a partnership between the school, students, and their respective families. Students with both parents and a school community that have high expectations for their academic performance generally exceed expectations.<sup>12</sup> The cornerstone of our partnership with families is clear and consistent communication. To that end, we will recruit and build a **Parent Advisory Committee** comprised of parents of enrolled students to provide input on behalf of our parents and support the school in the execution of our mission. Their contribution to our school community may include, but not be limited to, volunteering within the school, organizing/promoting/implementing family events at the school, welcoming new families, completing and helping collect our annual **Parent Satisfaction Surveys**, and meeting monthly. The Parent Advisory Committee will work directly with key school staff members such as the Executive Director and Director of Community Engagement, however the Committee will not be responsible for creation or implementation of school policies.

**6. Complaint Process** Vanguard Collegiate values respectful, responsible, ethical and professional interactions with all our families. It is the goal of the school and our governing Board that all staff and parent concerns, challenges, complaints and/or grievances are resolved at the school level in a fair and amicable manner. However, should a parent find the school's administration unable to resolve or address their concern, per our Student and Family Handbook presented to families at Parent Orientation in their preferred

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<sup>11</sup> Carpenter, B. L. (2007). *Charter School Board University*. Mt. Pleasant, MI: National Charter Schools Institute.

<sup>12</sup> Benner, A. & Mistry, R. "Congruence of Mother and Teacher Educational Expectations and Low-income Youth's Academic Competence." *Journal of Educational Psychology*. Volume 99, no. 1. 2007.

home language, or should the matter involve ethical, safety, or legal concerns, formal complaints may be brought before the Board following our **Complaint Procedure**. The Board is legally responsible for following the formal Complaint Procedure when responding to formal complaints. **Step 1: Informal Process.** A parent with a concern should seek to resolve the matter at the level where it has occurred. Parents may discuss their concerns with a teacher first and as soon as possible. If the concern is not resolved, then they should discuss the concern with a member of the school's administrative team (Executive Director or Dean) within ten (10) days after discussion with the teacher. If the concern is not resolved after talking with the Executive Director or another administrative team member, then parents should follow the formal process to submit a written complaint. There is a one (1) year statute of limitations for filing a formal complaint/grievance from the time of the incident. **Step 2: Formal Complaint/Grievance.** If no agreement is reached in Step 1, a parent may file a formal complaint, which should be submitted within ten (10) days after the meeting with the Executive Director. Written confirmation of receipt for all formal written complaints will be sent within 48 hours. At such time a meeting date/time will be established to allow parents to present their grievance. **Step 3: Formal External Process.** When a parent's complaint/grievance has not been resolved within the school, the next step is to contact the school's Board of Directors. All grievances will be dealt with by the Board on an as-needed basis. Formal responses submitted to the Board shall receive confirmation of receipt within one (1) business week. Prior to the next Board meeting from the date of receipt, barring the complaint is submitted the week prior to the Board meeting, the Board will render a determination in writing if appropriate or required. The Board, as necessary, may direct the Executive Director or other responsible party(ies) to act upon the complaint and report to the Board. At each step of the process, every effort will be made to address each matter to the satisfaction of the individual or group presenting the grievance.

**7. Proposed Executive Director Robert Marshall** is a Building Excellent Schools (BES) Fellow. An accomplished leadership professional, Robert Marshall brings a breadth of human services, program management experience, and accomplishments in the Fellowship as he sets out to found and lead an excellent school in Indianapolis, IN. A native to Indianapolis, Mr. Marshall is committed to ensuring access to a high-quality, high-achieving middle school for minority and under-served youth in his city. After completing his first undergraduate degree at Morehouse College, Mr. Marshall began a career in program management largely focused in youth development. With a deep concern for the achievement gap among our country's youth, he has approached every challenge with the goal of leveling the playing field. Having held leadership positions in organizations such as 100 Black Men of Indianapolis, and the Boys and Girls Club of Indianapolis, Mr. Marshall honed skills essential to any Executive Director. He has been an integral part of large fundraising initiatives, strategic plan development, and volunteer management. Most recently, he worked as the Senior Director of Programs at the Center for Leadership Development, an organization located on Indianapolis' Westside whose mission is to foster the advancement of minority youth in Central Indiana as future professional business and community leaders, encouraging personal development and educational attainment. In this role, he was responsible for a variety of programs and initiatives including the College Prep Institute, where he developed and oversaw the delivery of quality curricula that empowered his students to enact change within their society and pursue higher education. Mr. Marshall oversaw all marketing, recruitment, and data management within the organization. With an in-depth knowledge of operational effectiveness, Mr. Marshall is committed to founding and leading a school that will provide its students with the tools to succeed in college and in the professional world beyond. Mr. Marshall received his B.A. in Political Science and Law from Morehouse College and is a 2018 candidate for B.A. in Organizational Leadership from the University of Indianapolis where he plans to also pursue an M.B.A. in Education Leadership. He has completed graduate work in the M.B.A. of Management and Strategy at Western Governors University. Mr. Marshall is a Child and Youth Care – Professional, the highest certification level in the youth development field and is based on: (1) extensive demonstration of competence and work experience in multiple practice settings such as direct care, supervisory, programmatic, and administrative capacities; (2) graduation from baccalaureate, masters or doctoral degree programs based on the five competency domains (professionalism, cultural and human diversity, applied

human development, relationship and communication, and developmental practices); (3) supervision of large groups of staff or service as a program developer, administrator, senior supervisor, researcher, trainer or educator; and (4) minimum of five years of experience working with children, youth, and families. He is also a graduate of Boys & Girls Clubs of America’s Advanced Leadership Program and Indiana University’s Lilly School of Fund Development Principles of Fund Development program. Mr. Marshall has leveraged his experience as a Fellow with Building Excellent Schools to build knowledge and skills in curriculum and instruction, including but not limited to, deeply studying and analyzing more than 40 high performing charter schools across the nation and receiving training from content experts in curriculum, instruction, school culture development, implementation, and evaluation, and organizational leadership. Mr. Marshall has also completed two month-long residencies at well-respected charter schools. In January, he completed a five-week residency in school leadership at Freedom Preparatory Academy in Memphis, TN – a Tennessee Department of Education Level 5 school- where he received training and practice in areas including, but not limited to, teacher and school leader coaching, professional development, and financial management.<sup>13</sup> In August, he completed a five-week residency in school leadership at Milwaukee Excellence Charter School in Milwaukee, Wisconsin where he received training and practice in areas including, but not limited to, lesson planning and execution, school systems (arrival, dismissal, transitions, behavioral, etc.), curriculum alignment, student and family orientation(s), and start of the school year operations. **Attachment 1** outlines the training Mr. Marshall received during of his Fellowship with BES.

Mr. Marshall brings success in a number of key areas critical to the role of Executive Director. **Figure 2** connects job functions of the Executive Director with Mr. Marshall’s experience and/or education.

**Figure 2: Proposed Executive Director Experience Alignment**

Responsibilities	Role	Accomplishments
Ensure student academic performance and discipline metrics are meeting/exceeding expectations	Boys & Girls Clubs of Indianapolis; Center for Leadership Development; AmeriCorps; Advanced Leadership Program – Boys & Girls Clubs of America	Increased educational programming 300+% in one year; 90+% iRead passage rate; Higher high school graduation, college enrollment/ matriculation/graduation rate for African-American students than any school corporation in Indiana
Ensure Special Population support metrics meet/exceed expectations	Direct Care Staff, Resolute (not on resume); Advanced Leadership Program – Boys & Girls Clubs of America	Specialized training from BGCA; Served as school support for clients at resident treatment facility for mentally ill adolescents
Track and manage from student enrollment, attendance, attrition and promotion metrics	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development	During t2012-13 school year, increased average daily attendance by 41%, total visits to Club by 43%, participation in academic enrichment programs by 344% (highlighted in “8 Ways to Boost Your ADA” in Winter 2013 issue of <i>Boys &amp; Girls Clubs of America’s Connections</i> publication); In 2014 (Aug – Dec), led 240% increase in service touches delivered; Surpassed unduplicated number of participants served in all of 2014 by September of 2015; Organizational record number of service touches delivered in 2015 and 2016
Build/Sustain strong school culture	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America	Responsible for culture and discipline at Indy Parks, 100 Black Men, BGC, CLD; Redesigned discipline system for BGC and CLD; Specialized training in organizational culture from BGCA

<sup>13</sup> According the Tennessee Department of Education, in 2015 Freedom Preparatory Charter School received the status of A, A, and A for Math, Reading, and Science in grades 4-8 based on the TN value-added growth standard.

Build/sustain sound operational systems	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America; Principles of Management – University of Indianapolis	Partnered with Transform Solutions to create a Standard Operating Procedures manual still used at CLD; Redesigned all program handbooks at Indy Parks, BGC and CLD; Specialized training from BGCA
Report monthly to the Board	City of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America	Responsible for monthly board reporting at Indy Parks, 100 Black Men, BGC, and CLD Redesigned monthly reporting dashboards at 100 Black Men, BGC, and CLD
Recruit/manage/train/evaluate the school leadership team	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America; Principles of Management – University of Indianapolis	Created Succession Plan that trained five leaders that become senior leaders within their respective organizations; Managed staff of 3-40 youth development professionals; Specialized training from BGCA
Recruit/manage/train/evaluate teachers and other school staff	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America; Principles of Management – University of Indianapolis	Served on Human Resources, Hiring Practices, Unit Director Training Sub-committees to redevelop organizational practices; Recruited, hired, trained, managed, evaluated licensed teachers w/in 100 Black Men Summer Academy; Responsible for large portion of annual operating budget of \$1.8M and 20+ staff members at CLD
Ensure legal compliance (federal, state and local)	City of Indianapolis; Boys & Girls Clubs of Indianapolis; Principles of Management – University of Indianapolis; Advanced Leadership Program – Boys & Girls Clubs of America	Responsible for federal, state, and city grant reporting at BGC and Indy Parks; Specialized training in legal compliance
Complete accurate reporting to external stakeholders	City of Indianapolis; 100 Black Men of Indianapolis; Boys & Girls Clubs of Indianapolis; Center for Leadership Development; Advanced Leadership Program – Boys & Girls Clubs of America; Principles of Fund Development – Indiana University Lilly School of Philanthropy	Specialized training in board management from Indiana University; Responsible for monthly board reporting at Indy Parks, 100 Black Men, BGC, and CLD; Created and implemented quarterly stakeholder engagement events at CLD Responsible for all program-related grant reporting at CLD

In addition to the number of skills Mr. Marshall brings to this work, his national support from Building Excellent Schools will continue minimally through Vanguard Collegiate’s second year of operation. Luke Van de Walle, Director of Leadership Development with Building Excellent Schools, and a resident of Indianapolis, will provide direct coaching and support to Mr. Marshall. Mr. Van de Walle was the founding Head of School at KIPP Delta College Prep, as well as the Chief Academic Officer for KIPP Delta, and brings a wealth of knowledge and expertise in successful school start-up to his role as coach.

**8. Planning Year Leadership Team and Compensation** Our organizational chart was designed to ensure we are providing high-quality, rigorous instruction, as well as providing, from Day 1, a school grounded in a culture of respect, structure, high academic and behavior expectations, discipline, and support, setting students on a path for high school, college, and life success.

Upon authorization, the Board intends to set compensation for and hire Robert Marshall as Executive Director. The Executive Director will report directly to the Board, who will evaluate the Executive Director

on an annual basis. Upon authorization and school opening, Vanguard Collegiate will receive in one sum a \$325,000 start-up grant from the Walton Family Foundation (WFF). Following authorization, Mr. Marshall’s pay will come directly from the WFF Grant. A letter of commitment of these funds can be found in **Attachment 16**. Additionally, Vanguard Collegiate will hire a Director of Community Outreach and a Dean of Curriculum and Instruction in January 2018 to ensure the school’s ability to reach enrollment targets and plan high-quality, rigorous curriculum and assessments. As outlined in our budget, all salaries for staff leading development of the school during the planning year will be supported by the WFF grant.

**9. School Administrative Team** The Executive Director will be supported in Year 1 of operation by an administrative team comprised of a Dean of Curriculum and Instruction (DCI), Office Manager, and a Director of Community Engagement. The DCI’s primary focus is the creation and implementation of the school’s academic program in grades 5 and 6 (Lower Academy); we will bring on a second DCI in year 5 of operation to oversee our academic program for grades 7 and 8 (Upper Academy). The Executive Director will assume operational responsibilities, including but not limited to, staffing, finances, facility, scheduling, project management, vendor management, and supervision. We will hire a Director of Operations in Year 3 to support these operational responsibilities. School leadership will support a team of teachers, office staff, and support staff. All leadership team members will be committed to our mission and vision, invested in growth-mindset, experienced working with children, and skilled critical thinkers. **Figure 3** outlines the school leadership team roles and responsibilities.

**Figure 3: School Leadership Team**

Year	Role	Responsibilities
2017-2018	Executive Director	Ensure academic achievement, strong school culture, fiscal well- eing, and sound operational systems. Report directly to Board and manage school leadership team (and teachers, as needed)
2017-2018	Lower Academy DCI	Lead curriculum and assessment development, oversee teacher development, support and oversee teachers
2019-2020	Dean of Culture	Oversee positive school culture, safe school environment, character education, and manage discipline issues
2019-2020	Director of Operations	Oversee school operations including facilities, scheduling, vendor relationships, and school finances.
2022-2023	Upper Academy DCI	Lead curriculum and assessment development, oversee teacher development, support and oversee teachers

The process for recruitment of leadership team members and teaching staff began in the fall of 2017, as recruitment of quality staff is essential to the success of Vanguard Collegiate. We have built a relationship with Indianapolis Teach For America and intend to pursue a formal placement school partnership in November 2017. We plan to build relationships with the schools of education at Indiana University Purdue University Indianapolis, Marian University’s Educators College, the University of Indianapolis, as well as with the Indiana Professional Educators. In addition, we will recruit teachers from Historically Black Colleges and Universities. Vanguard Collegiate will also pursue candidates that are non-traditional into the work, coming from corporate positions into the teaching profession.

The recruitment process will begin with publicly announcing available roles and job descriptions for those roles through local and national recruitment platforms. Additionally, we will actively seek out recruitment opportunities and participate in the recruitment opportunities displayed in **Figure 4**.

**Figure 4: Recruitment Activity and Timeline**

Activity	Description	Timeline
Job Postings	Teach For America Jobs Board, Idealist, JAG Jobs, HBCU Career Center, Leadership for Educational Equity, Teach Plus, University of Indianapolis’ Professional Edge Center, Marian University’s Educator College	November 2017

Career Fairs	Attend several career fairs across a variety of organizations and states including college and university fairs, Chamber of Commerce, and the Indianapolis Urban League	Winter 2017/2018
Strategic Partnerships	Stand for Children, the Network for Quality Education, and the Indianapolis Urban League, The Center for Leadership Development	Ongoing

Once recruited, candidates complete a rigorous hiring process; see more detail in **Section III: Human Capital**.

**10. Educational Service.** Vanguard Collegiate plans to work with external educational services as needed. Those currently identified are Building Excellent Schools, EdTec, EdFit, the Network for Quality Education, and Marion University’s Educators College.

**11. Decision Making Authority.** Please see **Attachment 3 (Exhibit D)**.

## SECTION 2: SCHOOL DESIGN

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### EDUCATION PLAN

#### **Innovation**

Innovation at Vanguard Collegiate exists to propel high academic achievement and ensure students’ preparation for college and life success. To reach our ambitious mission and accountability goals, we propose a school model that will accelerate student success through using innovative approaches that are not available to students in traditional school models within our target community. These research-based innovative approaches and have yielded strong results in schools serving a similar student population.

**1, 2. Innovative Model Elements and Efficacy.** Vanguard Collegiate’s model differs from a traditional school model as it includes: (a) extended school day; (b) expanded time in English language arts and Math; (c) blended learning; (d) character development; (e) service learning curriculum and Capstone Projects; (f) college preparedness plan for every student; and (g) daily tutoring to support academic growth.

**Extended School Day.** The Vanguard Collegiate calendar consists of 185, 8.5-hour school days (8:00 am – 4:30 pm) Monday through Thursday and a 7-hour day each Friday (7:30am-2:30pm). With our school year four (4) days longer than Indianapolis Public Schools, our extended school day cumulatively provides scholars approximately 25 more days of instructional time than they would otherwise receive. An extended school day is shown to increase student achievement in mathematics and literacy, improve literacy outcomes for students performing below standards, and improve social-emotional skills of students with attention deficit/hyperactivity disorder.<sup>14</sup> Our expected student population will come from Indianapolis Public Schools with an average ISTEP passing rate of 25.3% (2016); we will use extended time to support their rapid growth in both math and English language arts.<sup>15</sup> Our extended school day provides 160 minutes of Literacy and 110 minutes of Math instruction daily. We maximize instructional time and prioritize student growth in these areas for all students to achieve Math and ELA proficiency at or above grade level.

**Blended Learning.** To meet the needs of all students, instruction will be strategically differentiated through the targeted use of blended learning with a one-to-one laptop to student ratio. Every student will access high-quality computer-based learning programs that allow students to access content on their level, ensure individualized instruction, and receive rapid feedback on practice, all proven effective in closing learning gaps for students performing below grade level in reading and math. Power Hour will be grounded in software and curriculum such as LC Manage, Nexus, and Compass Analytics and Tracking - all used by schools such as Purdue Polytechnic and Lawrence Township schools. The strategic use of blended learning

<sup>14</sup> Kidron, Yael, and Jim Lindsay, “The Effects of Increased Learning Time on Student Academic and Nonacademic Outcomes: Findings from a meta-analytic review.” Institute of Education Sciences, U.S. Department of Education, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Appalachia. July 2014. [https://ies.ed.gov/ncee/edlabs/regions/appalachia/pdf/REL\\_2014015.pdf](https://ies.ed.gov/ncee/edlabs/regions/appalachia/pdf/REL_2014015.pdf).

<sup>15</sup> McCoy, Dylan Peers. “IPS Test Scores Drop At Top Schools, First ‘Innovation’ School.” 17 November 2016. <http://www.wfyi.org/news/articles/ips-test-scores-drop-at-top-schools-first-innovation-school>.

as a tool to accelerate the efficiency and effectiveness of instruction will also aid students in gaining independence in learning, another critical element for students matriculating into high school.

**Character Development.** Vanguard Collegiate’s THINK Values of Team, Hard Work, Integrity, Nobility, and Knowledge are necessary for our scholars’ academic success and personal growth. **Team.** Scholars are taught to take ownership of their actions and of their community, growing our students’ understanding that our individual success is connected to the success of our community. We will teach scholars and they will come to recognize that the opportunities afforded to them come in exchange for their service to their community. **Hard Work.** We will celebrate, honor, and require our students to work hard. Scholars will establish academic and life goals tied to their immediate academic growth and long-range life plans, as well as commit to the plan, habits, actions, and thoughts essential to achieve those goals each day, week, month, and year. **Integrity.** Scholars will do the right thing even when it is difficult, and we will teach students what integrity looks like and how it is a core part of our character. **Nobility.** Scholars will be taught at every grade level to act with respect, dignity, and morality. Scholars will take pride in their work and the professional impressions they make. **Knowledge.** Scholars will establish learning as a goal and relentlessly pursue improvement as they gain the knowledge, skills, and habits that will put them on a successful path in college and life. All scholars will learn to effectively question, infer, articulate a stance, and solve problems. Scholars will be taught how to immediately get to work in class and thus build their academic stamina in and out of the classroom and we will provide more challenging material as students’ endurance increases, supporting students to become ambitious thinkers and learners across their four years with us.

Informed by these values, we will provide a highly-structured school culture with clear routines, high expectations, joy, and supports that lead to student achievement. Intentional character development supports growth of necessary skills for college success, including critical thinking and discipline.<sup>16</sup> Students that participate in a school-based, academic-related character development programs have decreased substance use, violence, and sexual activity.<sup>17</sup> Our core values are taught and celebrated school-wide and are central to our discipline system, with rewards and consequences directly connected to these values. Character development is the focus of our daily Morning Motivation meetings. For example, scholars will each share what makes them feel successful one by one using the sentence starter, “Today, I can show Integrity by…”

**Service Learning and Capstone Projects.** With a firm belief that student ownership and responsibility are important factors in college success, Vanguard Collegiate will provide service learning opportunities to each student, including a Capstone Project. Service learning increases student attendance, decreases the probability that students will engage in “risky” behaviors, builds their social responsibility and citizenship skills, and helps them acquire and apply academic skills and knowledge.<sup>18</sup> Vanguard Collegiate is committed to developing students of high character that will positively impact the success of their local community and our city. We plan to engage with **ProAct**<sup>19</sup>, a nonprofit that positions economically disadvantaged youth in Marion County to work alongside Indianapolis professional groups, organizations, and volunteers as the givers and creators of the community outreach projects closely aligned to the Indiana Academic Standards. Through a **Capstone Project**, all 8<sup>th</sup> grade students will learn the impact of supporting their community through policy, advocacy, and community development. This required service learning and out-of-school leadership opportunity will build students’ knowledge, skills, and character, all of which are shown to positively impact students’ academic performance. As part of Capstone Projects, community organizations are invited into the school to pitch need(s) to student groups. We will target partner organizations such as Christamore House, Mary Riggs Center, Hawthorne Community Center, Families in Transition, Christamore Court Apartments, and the Haughville Neighborhood Association in collaboration

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<sup>16</sup> Garcia, Emma. “The Need to Address Noncognitive Skills in the Education Policy Agenda Report.” Economic Policy Institute. December 2, 2014. <http://www.epi.org/publication/the-need-to-address-noncognitive-skills-in-the-education-policy-agenda/>.

<sup>17</sup> Acock, Alan C., et al. “Preventing Negative Behaviors Among Elementary-School Students Through Enhancing Students’ Social-Emotional and Character Development.” *American Journal of Health Promotion*. Vol. 28 Issue 1, p50-58. 9p. Sep/Oct2013.

<sup>18</sup> Bilig, Shelley H. *Research on K-12 School-Based Service-Learning: The Evidence Builds*. v81 n9 p658-64. Phi Delta Kappan. May 2000.

<sup>19</sup> <http://www.proactcp.org/who-we-are/>.

with these projects. This approach empowers students from the surrounding area to make a specific, positive, observable, and sustainable change in their community while learning real-world skills and tackling important challenges facing the community.

**College Preparedness Plan.** Each eighth grade student will build an academic success plan in preparation for high school that models key aspects of college applications. With staff guidance and family input, students will build a portfolio complete with assessment results, evidence of participation in extra-curricular activities, community volunteer and leadership experience, letters of recommendation, and an academic transcript that shows mastery in core academic areas. The plan will map out each student's target courses to obtain an I.B. diploma<sup>20</sup> from a competitive high school, external development opportunities, and both college and career choices. We will measure student progress towards college readiness with individualized academic goals for every student that include but are not limited to grades, assessment results, and Indiana Career Explorer results. Our assessment system is described in **Performance Measures – Assessments.**

**Tutoring.** Teachers and students engage in content-based tutoring and mentoring daily. Exit tickets are used to prioritize a student's academic needs and identify the tutoring session best suited for them daily. Students will have an opportunity to get assistance with homework and/or work ahead using one of our Blended Learning software options.

**3. Accountability Standards.** Vanguard Collegiate's research-based, innovative school model components are implemented to accelerate student learning and ultimately to ensure students are on the path to college graduation and career success. As a charter school, the ICSB will be able to hold Vanguard Collegiate to the same high accountability standards as all authorized schools.

## **Curriculum and Instructional Design**

**1) Instructional Design Framework.** Vanguard Collegiate of Indianapolis is committed to educating the students of Indianapolis' on the Near Northwest side, equipping them with the critical thinking skills, integrity, and sense of social and personal responsibility needed to be clearly on the path to high school, college, and career success. Vanguard Collegiate will operate a classroom-based model; in Year 1, we will have 4 classrooms (two fifth grade and two sixth grade) of 30 students (total of 120 students). We will implement a slow growth model, adding seventh grade in our second year of operation, and will be fully grown to eighth grade in our third year of operation. At full scale, we will have a Lower Academy (fifth and sixth grades) and Upper Academy (seventh and eighth grades). The Lower Academy focuses on building academic foundations and scholar enculturation. In the Upper Academy, scholars are focused on proficiency, mastery, higher order thinking skills, and high school preparation. We will matriculate students with academic achievement results that rival those of the best schools locally and nationally through:

- **High quality instruction of rigorous college preparatory curriculum** in all content areas, aligned to the Indiana Academic Standards
- Longer school day (8.5 hours) and school year (185 days) with expanded time for learning
- Prioritized **focus on literacy and math**, with 160 minutes of English and 110 minutes of Math instruction daily for all fifth through eighth grade students
- Consistent communication with families about their scholar's academic achievement and needs through weekly progress reports, biweekly phone calls, and monthly schoolwide family events
- Blended instruction with technology –Math and English classrooms with blended learning model where students rotate from computer-based individualized learning programs to small group targeted instruction with specialized attention from teachers to independent work time;
- Co-curricular offerings that allow students to discover their interests and passions while preparing them for college and career
- Direct support to students and families as they navigate the high school selection process.

We believe that strong foundations in literacy and mathematics are critical for student success. In literacy,

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<sup>20</sup> <http://www.doe.in.gov/ap>.

students will read and analyze grade level and above grade level texts that vary in complexity and genre such as *The Giver* and *Raisin in the Sun*. They will engage in written responses and verbal discussions to proficiently analyze and use the texts independently. In mathematics, students will display grade level mastery in number sense, computation, algebra, functions, geometry, measurement, data analysis, and statistics. All students will complete eighth grade Algebra and Socratic seminars that require strong academic foundations built in the early middle school grades.

We anticipate 70% of incoming students will be behind academically based on the most recently available data within the target zipcode.<sup>21</sup> To reach our ambitious mission and place students on the path to college success, we ensure we can both catch students up to grade level academically, as well as accelerate their learning. We dedicate 160 minutes to literacy and reading and 110 minutes to mathematics instruction daily to ensure all students are on grade level by the end of sixth grade, and are high school ready by the end of eighth grade as measured by student achievement results of both ILEARN and NWEA-MAP.

The Indiana Academic Standards (IAS) provide a cohesive framework to help educators, parents, students, and community members understand what scholars should understand and can do at each grade level to be college and career ready.<sup>22</sup> Vanguard Collegiate adopts the backward design process in our strategic and instructional planning.<sup>23</sup> The Executive Director and Dean of Curriculum and Instruction are responsible for the selection, purchase, development, implementation, and evaluation of the curriculum, ensuring alignment with state and national standards, as well as alignment with college readiness benchmarks.<sup>24</sup> They will determine the scope and sequence of standards and skills and develop the unit and interim assessments, and end-of-course assessment for each grade level and subject area.<sup>25</sup> From unit plans and assessments to the daily lessons and objectives, all curriculum and content instruction will drive towards college readiness. Each content area will be **vertically aligned** from fifth through eighth grade, ensuring skills and content build from grade level to grade level and that students are academically prepared to earn promotion to the next grade level. Curriculum is **horizontally aligned**, ensuring skills and content apply across individual disciplines as relevant.

To ensure curriculum meets a rigorous and objective bar consistently, we will teach to all demands of the Indiana Academic Standards (IAS), which include English Language Arts (“ELA”), Mathematics, Science & Computer Science, and Social Studies. For academic co-curricular classes, we will teach other classes identified by the Indiana State Department of Education including Fine Arts and Information Technology. A map of courses from fifth through eighth grade can be found in **Figure 5**.

**Figure 5: Courses by Subject and Grade Level**

Subject	Grade 5	Grade 6	Grade 7	Grade 8
Mathematics	Math 5	Math 6	Pre-Algebra	Algebra I
Reading	Literacy 5	Literacy 6	Literacy 7	Literacy 8
Writing	Writing 5	Writing 6	Writing 7	Writing 8
Power Hour	Reading Power Hour Math Power Hour	Reading Power Hour Math Power Hour	Reading Power Hour Math Power Hour	Reading Power Hour Math Power Hour
Social Studies	US History	Western World History	World History	US Government
Science	Physical Science	Earth and Space Science	Life Science	Engineering & Technology

<sup>21</sup> <http://www.doe.in.gov/accountability/find-school-and-corporation-data-reports>.

<sup>22</sup> <http://www.rbbesc.k12.in.us/2016-07-03-17-46-36/academic-standards>.

<sup>23</sup> Wiggins, Grant P, Jay McTighe, Leslie J. Kiernan, and Frank Frost. *Understanding by Design*. Alexandria, Va: Association for Supervision and Curriculum Development. 1998.

<sup>24</sup> To be completed with the support of Building Excellent Schools and with resources from high performing schools within the BES network.

<sup>25</sup> Ibid.

<b>Co- Curricular</b>	Critical Thinking 1	Critical Thinking 2	Service Learning	Exploring College and Careers, Middle Level
	Art	Visual Art	Creative Dramatics	Exploring Music
	Coding	Coding	Coding	Coding
	Physical Education	Physical Education	Physical Education	Physical Education

**Literacy.** A student’s ability to read on grade level is critical for their success in high school and college; those not reading on grade level by the end of third grade are significantly less likely to graduate from high school. Based on student performance data on the Near Northwest side of Indianapolis, we anticipate 70%<sup>26</sup> of incoming students unable to read on grade level, and thus are at great risk of not completing high school.<sup>27</sup> To catch students up and ensure they can perform on or above grade level before the completion of middle school, we dedicate 160 minutes to literacy instruction daily, including a 50-minute literacy class, 50-minute writing class, and 60-minute Reading Power Hour. This 160 minutes of targeted ELA instruction will best ensure all students can read on grade level by then end of sixth grade. Reading instruction concentrates on reading comprehension and text-based analysis of a variety of genres and texts, ranging in level and complexity. In Writing, students focus on grammar and mechanics, the writing process, and development of essays over time. Students will write in a variety of genres, including argumentative, informational, and narrative pieces. Students will become consumers of critical text and develop critical thinking skills. **Figure 6** outlines the learning arch of students from fifth through eighth grade:

**Figure 6:English Language Arts Learning Arc<sup>28</sup>**

<b>ELA 5</b>
<b>Instructional Emphasis:</b> Identify Concepts; Phonological Awareness; Phonics; Fluency; Reading, Writing, Speaking, Listening
<b>Text Type:</b> Classic and contemporary literature; historical fiction; fantasy or science fiction; mystery or adventure; folklore or mythology; Poetry, short stories, and dramas; nonfiction selections; various reference or technical materials; online information; transitional text.
<b>Skills:</b> Apply foundational reading skills to demonstrate reading fluency and comprehension; Orally read grade-level appropriate or higher texts smoothly and accurately, with expression that connotes comprehension at the independent level; Read and comprehend a variety of literature within a range of complexity appropriate for grades 4-5; Interact with texts proficiently and independently; Use appropriate language, present information on a topic or text, narrative, or opinion in an organized manner, with effective introductions and conclusions, using appropriate structure, appropriate facts and relevant, descriptive detail to support main idea or themes; Create engaging presentations that include multimedia components and visual displays when appropriate to enhance the development of main ideas or themes; Summarize a speaker’s points as they relate to main ideas or supporting details and demonstrate how claims are supported by reasons and evidence; Orally summarize or respond to a written text read aloud or information presented in diverse media and formats; Conduct short research assignments and tasks on a topic.
<b>ELA 6</b>
<b>Instructional Emphasis:</b> Reading; Writing; Speaking; Listening.
<b>Text Type:</b> Classic and contemporary literature; historical fiction; fantasy or science fiction; mystery or adventure; folklore or mythology; poetry, short stories, and dramas; nonfiction selections; various reference or technical materials; online information.
<b>Skills:</b> Research skills; Writing or delivering reports that demonstrate the distinction between their own ideas and the ideas of others; Use of simple, compound, and complex sentences to express their thoughts; Delivery of oral presentations on problems and solutions; Show evidence to support their views.
<b>ELA 7</b>
<b>Instructional Emphasis:</b> Reading; Writing; Speaking; Listening
<b>Text Type:</b> Fiction selections (classic and contemporary); Historical fiction; Fantasy or science fiction; Mystery or adventure Folklore or mythology; Poetry, short stories, and dramas; Nonfiction selections; Various reference or technical materials; Online Information.

<sup>26</sup> Ibid

<sup>27</sup> <http://www.doe.in.gov/accountability/find-school-and-corporation-data-reports>.

<sup>28</sup> Indiana Department of Education. Indiana State Approved Course Titles and Descriptions: Middle Level Grades 6-8. <http://www.doe.in.gov/sites/default/files/ccr/2013-2014-middle-school-course-descriptions.pdf>.

**Skills:** Students self-select books of interest and read independently; Respond to fiction, nonfiction and informational selections or reality-based experiences with multimedia oral discussion, reading, writing, art, music, movement, and drama; Make presentations, and classroom or group experiences; Write or deliver longer research reports that take a position on a topic; Support their positions by citing a variety of sources; Use a variety of sentence structures and modifiers to express thoughts; Deliver persuasive presentations that state a clear position in support of an argument or proposal.

### ELA 8

**Instructional Emphasis:** Reading; Writing; Speaking; Listening.

**Text Type:** Fiction selections (classic and contemporary); historical fiction; fantasy or science fiction; mystery or adventure; folklore or mythology; poetry, short stories, and dramas; nonfiction selections; various reference or technical materials; online information.

**Skills:** Use oral discussion, reading, writing, art, music, movement, and drama, students respond to fiction, nonfiction, and informational selections or reality-based experiences, multimedia presentations, and classroom or group experiences; Write or deliver research reports; Conduct their own research; Use subordination, coordination, noun phrases and other devices of English language conventions to indicate clearly relationship between ideas; Deliver variety of types of presentations and effectively respond to questions and concerns from audience; Listen to literature read aloud to them and write independently; Study history and development of English vocabulary; Compare different types of writing as well as different perspectives on similar topics or themes; Evaluate logic of informational texts and analyze how literature reflects backgrounds, attitudes, and beliefs of authors.

**Mathematics.** Vanguard Collegiate will develop students as mathematical thinkers so that they are competent users of mathematics concepts and mathematical applications. Scholars will master mathematical concepts and analytical skills, quantitative and abstract reasoning, and the use of mathematics as a computational and analytical tool. Upon entering fifth grade, more than 70% of scholars will be below grade level in mathematics.<sup>29</sup> We will focus on numeracy and mathematical fluency skills in fifth grade, as well as on the fifth grade Indiana Academic Standards. Grade 6 begins the transition from the heavy emphasis on number and operations at the elementary school level towards a more formalized preparation for study of mathematics at the high school level.<sup>30</sup> The aim of Math 6 is to “extend previous understanding of the number system and operations to fractions and negative numbers; apply and extend previous understandings of the number line to plot coordinate pairs on a Cartesian plane; formalize algebraic thinking into algebraic expressions and equations; apply their previous knowledge of geometry in real-world and mathematics situations; and begin to develop understanding of statistical variability and distributions.” In Math 7, students “extend ratio reasoning to analyze proportional relationships and solve real-world and mathematical problems; extend previous understanding of the number system and operations to perform operations using all rational numbers; apply properties of operations in the context of algebraic expressions and equations; draw, construct, describe, and analyze geometrical figures and the relationships between them; apply understandings of statistical variability and distributions by using random sampling, making inferences, and investigating chance processes and probability models.” By the end of Math 8, students will “extend their understanding of rational numbers to develop an understanding of irrational numbers; connect ratio and proportional reasoning to lines and linear functions; define, evaluate, compare, and model with functions; build understanding of congruence and similarity; understand and apply the Pythagorean Theorem; and extend their understanding of statistics and probability by investigating patterns of association in bivariate data.”<sup>31</sup> Students will complete Algebra 1 in 8<sup>th</sup> grade, ensuring they enter high school on track to enter a course of math study that can culminate with Calculus in the senior year, thus ensuring college readiness.

**Power Hour.** Based on the work of schools such as BES school Cornerstone Academy in San Jose, CA<sup>32</sup>, we will provide daily Reading Power Hour, students work in small groups for two 30-minute blocks daily. Those include teacher-led Guided Reading, as well as Vocabulary, Independent Reading, and targeted skill

<sup>29</sup> <http://www.doe.in.gov/accountability/find-school-and-corporation-data-reports>

<sup>30</sup> Indiana Department of Education. Indiana State Approved Course Titles and Descriptions: Middle Level Grades 6-8. <http://www.doe.in.gov/sites/default/files/ccr/2013-2014-middle-school-course-descriptions.pdf>

<sup>31</sup> Indiana Department of Education. Indiana State Approved Course Titles and Descriptions: Middle Level Grades 6-8. <http://www.doe.in.gov/sites/default/files/ccr/2013-2014-middle-school-course-descriptions.pdf>

<sup>32</sup> On average, BES schools outperformed their districts by 12 percentage points in English language arts and 18 percentage points in math. <http://buildingexcellentschools.org/2016-report-card/>

practice using blended learning programs. Math Power Hour will have a similar structure, with two 30-minute small group sections, supporting students with important skill and content practice, small group instruction, and remediation. Data from Power Hour will be used to determine additional supports scholars may require such as Saturday Academy, additional tutoring support, and/or after-school academic supports.

**Social Studies.** As we deeply believe in service learning, Social Studies will provide a way for students to connect current events to history and thereby broaden students' understanding of the challenges currently facing our local and global society. Coursework will build knowledge of history, geography, government, economic systems, current events/issues, and cultures in (1) Africa, (2) Antarctica, (3) Asia, (4) Australia, (5) the Caribbean region, (6) Central America, (7) the Commonwealth of Independent States, (8) Europe, (9) the Middle East, (10) New Zealand, (11) North America, (12) the Pacific Islands, (13) South America, and (14) the United States. Courses will have three primary foci: (1) Analysis of primary and secondary documents, (2) Document Based Question (DBQ) writing, and (3) Oral language development. Students will be given both primary and secondary sources themed through a common guiding historical question for those shared texts. Students will spend Monday reviewing the material as a class, Tuesday discussing in groups, and Wednesday engaging in a Socratic Seminar. The week culminates in students writing a historical response, and in upper grades an essay, aligned to the DBQ and thorough discussion of the documents. Social Studies will push critical thinking and application of reading, writing, and discussion skills and will build students' problem-solving and research skills.

**Science.** Inquiry-based learning which pushes students to think critically by analyzing information to draw conclusions has been proven effective as it has "increased the achievement scores of African American students [and] narrowed the achievement gap between male and female students."<sup>33</sup> This belief is reflected in our science curriculum, as we use an inquiry-based instruction approach to science instruction. We will internally create our science curriculum in alignment with Indiana Academic Standards, and use Full Optics Science Systems (FOSS) kits to supplement our inquiry-based approach. Students will use the Scientific Process to plan, create, and execute various science experiments to test hypotheses at each grade level. Students will write grade level appropriate full scientific laboratory reports explaining and analyzing their findings and detailing implications aligned to their hypotheses. Sixth grade students will learn "that matter is composed of different states with different properties and that energy has different forms with unique characteristics; the relationships between celestial bodies and the force that keeps them in regular and predictable motion; the complex relationships that exist between organisms in all ecosystems; and the major source of energy for all ecosystems is the sun."<sup>34</sup> Seventh grade students will "understand that energy cannot be created or destroyed, but only changed from one form into another or transferred from place to place; forces as they apply to nature and machines; how earth processes have shaped the topography of the earth and have made it possible to measure geological time; and the cellular structure of living organisms, from single-celled to multicellular."<sup>35</sup> By the end of eighth grade, students will know "how atomic structure determines chemical properties and how atoms and molecules interact; how the water cycle and air movement are caused by differential heating of air, land, and water and how these affect weather and climate; that natural and human events change the environmental conditions on the earth; and the predictability of characteristics being passed from parent to offspring and how a particular environment selects for traits that increase survival and reproduction by individuals bearing those traits."<sup>36</sup> Teaching science content through inquiry will allow students to internalize the ideas that are fundamental to a scientific understanding of the world.

**Co-Curriculars.** We provide physical education once per week throughout the year, and one additional co-curricular offering per trimester three times per week. These co-curriculars include one trimester of Coding,

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<sup>33</sup> Kahle, J. B., J. Meece, and K. Scantlebury. 2000. "Urban African-American middle school science students: Does standards-based teaching make a difference?" *Journal of Research in Science Teaching*. 37 (9):1019-1041.

<sup>34</sup> Indiana Department of Education. Indiana State Approved Course Titles and Descriptions: Middle Level Grades 6-8. <http://www.doe.in.gov/sites/default/files/ccr/2013-2014-middle-school-course-descriptions.pdf>.

<sup>35</sup> Ibid.

<sup>36</sup> Ibid.

one of Fine Arts, and one as a grade level specific course, outlined in **Figure 5**. In fifth grade Critical Thinking 1, students will develop deductive reasoning skills and build their knowledge and skills in deductive inference (including traditional syllogisms), fallacies, and the art of definition. In sixth grade Critical Thinking 2, students will learn the development of politics and political thought in ancient Greece and its evolution through Rome by studying and reading from Plato, Aristotle, and Augustine, as well as, the development of the idea of class and of rationalized authority as they affect current political challenges. In seventh grade Service Learning, students will develop an understanding of civic responsibility, the basics of asset-based community development and complete their **Capstone Project**. Through eighth grade Exploring College and Careers, students will “explore, analyze, and make informed decisions regarding college selection based on test competency and other variables; learn the format, content, expectations and grading of the SAT and ACT as well as how to register for and receive and report scores as part of the college-entrance process; read literary and informational text critically using skills to make meaning of words and analyze text using author’s craft and structure, reasoning and inferencing, organization, and literary elements in preparation for the Critical Reading section of the PSAT, SAT and ACT; develop essays using valid reasoning and sufficient evidence; communicating clearly and accurately through effective organization and analysis; applying correct grammar, conventions, and word choice in preparation for the Writing section of the PSAT, SAT and ACT; understand how to represent and interpret data; how to interpret experimental results; and analyze alternative viewpoints or hypotheses based on differing premises or incomplete data in preparation for the Science section of the ACT.”<sup>37</sup>

**Curricular Design.** Vanguard Collegiate will implement high quality, research-based curriculum as available and as aligned to state and national standards, and supplement this curriculum with an internally created scope and sequence, interim and unit assessments, and end-of-course assessment. The identified curricular resources that will be used include, but are not limited to: **EngageNY** will be our primary source to build our Scope and Sequence for ELA and Mathematics. The Executive Director and Dean of Curriculum and Instruction will create a sequence that draws from EngageNY and aligns with Indiana Academic Standards and use that scope and sequence to build end-of-trimester and end-of-course assessments. EngageNY drives towards college and career ready benchmarks and has been successfully implemented in high-achieving schools with a similar student population.<sup>38</sup> **Achieve3000** will be used as a core component of ELA curriculum.<sup>39</sup> During Reading Power Hour, students reading at or below grade level will use this online differentiated instruction literacy solution to receive grade-appropriate intervention matched to their individual Lexile level. Because the software is adaptive, rigor increases as students’ abilities grow, as measured by regular assessments on standards aligned skills and comprehension. **College Preparatory Mathematics (CPM)** offers a complete mathematics program for grades 6 through 12 and is designed to engage all students in learning mathematics through problem-solving, reasoning, and communication. We will use CPM to balance procedural fluency (algorithms and basic skills), as well as deepen conceptual understanding, strategic competence, and adaptive reasoning (transference and extension).<sup>40</sup> **Nexus**<sup>41</sup> is an adaptive virtual learning space that facilitates the most success methods of retaining mathematical fundamental knowledge. Student collaboration is fostered for students to get a deeper understanding of course materials through discussion. It also creates a real-time knowledge base, saving problems that students solve and allowing others to learn from steps they used to solve. Nexus will be used in Power Hour and tutoring to push student mathematical understanding and independent thinking. **Fountas & Pinnell Literacy** is a comprehensive, systematic design for high-impact literacy instruction. We will use it for professional development, its assessment, to provide effective intervention, and classroom resources to elevate our literacy teaching and student learning.<sup>42</sup>

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<sup>37</sup> [http://www.doe.in.gov/sites/default/files/standards/college-entrance-preparation/college\\_entrance\\_preparation\\_course\\_description.pdf](http://www.doe.in.gov/sites/default/files/standards/college-entrance-preparation/college_entrance_preparation_course_description.pdf).

<sup>38</sup> <https://www.engageny.org/about>.

<sup>39</sup> <http://www.achieve3000.com/about-us/>.

<sup>40</sup> <http://cpm.org/cc-program-description>.

<sup>41</sup> Used by schools such as Purdue Polytechnic High School, Indianapolis Public Schools, Indiana University, Purdue University, Indiana State University, and University of Toledo. <https://vimeo.com/231145249?ref=em-share>.

<sup>42</sup> <http://www.fountasandpinnell.com/intro/>.

We will use multiple resources to build our curriculum, including purchasing curriculum, using open source materials, and leveraging partnerships and collaboration with schools within the Building Excellent Schools Network. Additionally, we will use supplemental resources, including during our Power Hour (Math and Reading) daily courses where blended learning will support student growth, requiring students to access and use technology, including Zeal and Nexus.

**Highly Effective Teachers.** During the school’s inaugural year (2018-2019), it is the priority of leadership to establish a strong culture of achievement on which we can build a foundation of student academic achievement. In addition to receiving a year-long Scope and Sequence, Unit plans, interim assessments, and end-of-year assessments coupled with intentional, consistent coaching and support from the DCI and Executive Director, teachers will also receive exemplar lesson plans, ensuring the high bar of expectations for rigorous curricular planning is clear, outlined in **Figure 7**. A well-planned curriculum itself, however, does not ensure strong academic results for students. Vanguard Collegiate will hire and train top-talent to ensure their effectiveness in the classroom. During Vanguard Collegiate’s three-week **Summer Professional Development**, teachers will focus on improving their instructional skills through extensive practice-based professional development, as robust professional development can increase student achievement<sup>43</sup>. During Summer Professional Development, teachers will practice their lessons and receive feedback with the goal of delivering excellent instruction to students starting on the first day of school.

**Figure 7: Instructional Planning for 2018-2019**

Curricular Document	Trimester 1	Trimester 2	Trimester 3
Scope and Sequence; Interim Assessments	Developed by Dean of Curriculum and Instruction, overseen by Executive Director		
Unit Assessments	Exemplars provided for first three (3) units of the year	Teacher created, with support from school leadership	
Unit Plans	Exemplars provided for first three (3) units of the year	Teacher created, with support from school leadership	
Lesson Plans	Exemplars provided to teachers for first three units of study; teachers responsible for intellectual preparation and practicing lessons	Created by teachers, in collaboration with school leadership	Created by teachers, with feedback from school leadership

In subsequent school years, all teachers will receive exemplary assessments, unit plans, and lesson plans for the first unit of the school year to continually set a high bar for quality and rigor. For each new grade level (seventh grade in year 2, eighth grade in year 3) will receive the same curricular documents and support as in year 1. Additionally, new teachers will receive additional support later into the school year until they are gradually prepared to independently create lesson plans.

**2. Instructional Strategies.** An effective teacher is a key school-based lever that drives student achievement.<sup>44</sup> We will provide professional development that allows every teacher to deliver effective instruction and support strong student outcomes. As effective instructional practices are paramount to student success, we will use the following instructional strategies: **Extended Time.** We will provide 185 days of instruction, from 8:00am to 4:30pm Monday through Thursday with a 2:00pm dismissal each Friday to allow for weekly two-hour staff professional development. This extended time allows for extended literacy and math instruction, including Reading and Math Power Hour blocks that ensure individualized, targeted support and small group instruction. **Focus on Literacy and Numeracy.** Literacy is the foundational academic skill that underpins all other learning. Daily, we offer 160 minutes of ELA and 110

<sup>43</sup> Yoon, Kwang Suk, et al. "Reviewing the Evidence on How Teacher Professional Development Affects Student Achievement." *Issues & Answers*. 30 Sept. 2007.

<sup>44</sup> Stronge, James H., and Tucker, Pamela D. *Linking Teacher Evaluation and Student Learning*. ASCD. 2000.

minutes of math instruction, including Power Hours. This time is critical as our anticipated student population will be entering behind in reading and mathematics based on most recently available data. **Small Group Instruction.** Student supports means providing daily, targeted small group and individual remediation. This evidence-based method promotes student development and proficiency. Small instruction occurs at daily in ELA and math, Monday through Thursday, during Power Hours and afternoon tutoring. **Blended Learning.** Power Hour is a daily individualized intervention in a blended learning environment for all students to accelerate learning on their own level, whether to bring them up to grade level standards and skills or to push them ahead. The blended learning model has proven effective at high performing schools, including BES school Cornerstone Academy in San Jose, CA, as it allows for students to work at their own skill level and pace. **Habits of Discussion.** Discussion skills are critical for student success in high school, college, and beyond. Habits of discussion skills will be scaffolded from fifth through eighth grade, building in complexity as students move from grade to grade. Habits of discussion build skills in development of ideas, agreement and disagreement, active listening, and supporting ideas with evidence and reasoning.<sup>45</sup> In seventh and eighth grades, students will frequently engage in Socratic seminar, discussion-based instruction by which students, within the context of the discussion, actively listen, think critically, and articulate their own thoughts and their responses to the thoughts of others, using evidence- or text-based responses. Socratic Seminar discussion will take place across content areas, but will be prioritized in ELA and Social Studies.<sup>46</sup> **Taxonomy Training Techniques.** To best support teachers as they develop, we will leverage taxonomy techniques in Lemov’s *Teach Like a Champion 2.0*, allowing our staff to have a common language around best classroom teaching practices, and allowing for strong, whole-group practice-based professional development. **Figure 8** includes the techniques we will focus on first.

**Figure 8: Fundamental Core Instructional Techniques**

Skill	Description	Example
<b>100%</b>	Method in which teacher expects 100% of students to respond to or comply with question/direction 100% of the time.	Ms. Cobb uses the hand signal attention getter to get 100% of students tracking her and waiting for her clear What To Do directions. She waits until all students comply.
<b>Positive Framing</b>	Staff will deliver feedback in a manner that is productive, motivating, and caring and assumes the best for students.	Mr. Baker delivers a clear What To Do direction. As he waits for 100% compliance, he vocalizes praises for students complying (i.e. – “I love the way Larry has raised a strong, silent, college-bound hand!”)
<b>Strong Voice</b>	Teachers use a clear and firm tone, square up to the student or group, and use few words to give directions or set expectations with students.	Mr. Saunders delivers direction in non-urgent tone; students comply slowly. Mr. Saunders stops, squares feet, tells class, “Track me” in serious tone. He re-delivers original direction in urgent tone, with fewer words, and strong body language.
<b>What to Do</b>	Teachers will give directions in clear, concrete steps, focusing on what students should do.	Teacher states “Eyes on me, pencils down,” instead of “Don’t look around, stop writing <sup>47</sup> .”

**3. Scope and Sequence.** Attachment 4 includes our Core Curriculum Scope and Sequence overview and the timeline for curricular alignment during the school’s pre-opening year.

**4. Blended Learning.** Not applicable.

### **Pupil Performance Standards**

**1. Exit Standards.** Attachment 5 includes the exit standards, adopted from Indiana Academic Standards.

<sup>45</sup> Lemov, Doug, *Teach Like a Champion 2.0: 62 Techniques That Put Students on the Path to College*. San Francisco: Jossey-Bass, 2015.

<sup>46</sup> <http://www.readwritethink.org/professional-development/strategy-guides/socratic-seminars-30600.html>.

<sup>47</sup> Ibid.

**2. Promotion Policies and Standards.** Vanguard Collegiate will exhaust all possibilities, within reason, to ensure scholars are successfully matriculating on time. Students earn promotion to each grade based on (1) academic achievement in core content areas and (2) attendance. **Academic Achievement.** To earn grade-level promotion, students must earn a 70% or above as final grades in ELA, Math, Science, and Social Studies. Final grades are composed of scores on homework, class work, quizzes, exams, and End-of-Course Assessments (ECA). Students who do not earn a minimum of 70% in all classes may be considered for retention. Any student who earns below 70% in one or two class may be eligible for summer school. Any student who earns below 70% in more than two more classes will be retained. **Attendance.** To reach our ambitious mission, it is critical for students to be in school every day ready to learn. Any student who is absent for 15 school days may be considered for retention. We adhere to all regulations regarding student extended illness during which we provide school support and tutoring as required. Families will receive frequent communication regarding their child’s attendance, ensuring students are at school and are on-time. Promotion policies will be shared annually with families prior to the start of the school year through both in-home orientation conferences (new students) and at all school orientations (all students), and are provided in writing annually in our **Student and Family Handbook**. During the school year, we will host **Trimester Conferences** to deliver report cards and provide notice and discussion of student progress. In January, families of students identified as “Promotion in Doubt” will be notified. In February, written notice will be sent to students and families who may be in danger of not meeting the benchmarks for their grade level. At the 2<sup>nd</sup> Trimester Conferences, families and students will be notified of their progress and expected promotion decision. In May, at the end of Trimester 3, promotion decisions will be communicated to families. In June, identified students will attend **Summer Academy**. At the end of Summer Academy, scholars must earn a minimum 70% on the final comprehensive assessment for each class to be promoted.

**School Calendar and Schedule.** Attachment 6 includes the Annual Calendar and Weekly Schedule.

**School Culture.** A positive school culture directly impacts student achievement. Students thrive in structured, predictable learning environments in which they are challenged, supported, and invested. Dr. Lorraine Monroe writes, “[s]o many children today—and not just poor children—come from chaotic and unpredictable homes. Order in school gives them the stability and structure they need.”<sup>48</sup> We firmly believed that structure builds a safe learning environment, and our teachers are trained to lead structured and joyful classrooms. The pillars of school culture and foundation upon which the systems, routines, and procedures at Vanguard Collegiate are built include: (1) high expectations (2) accountability (3) support, and (4) joy. Beginning with the individual family meetings conducted by school leadership prior to the start of the school year and extending beyond a student’s academic career with our school, student will learn and embody our core values: Team, Hard Work, Integrity, Nobility, and Knowledge. Our **THINK** values will significantly and positively impact student academic performance and reduce disciplinary challenges.<sup>49</sup> These values will be in the hallways, every classroom, and part of the school’s common language. In addition to our values being directly correlated to our discipline system and infused in our curriculum. Ensuring that students, staff, leadership, and families understand our school culture prior to the first day of school is important in upholding our culture and setting up every student for academic and behavioral success. All members of our community are exposed to our culture including the core values before the academic year begins. Every new family will have an **In-home Conference** that will establish the foundation necessary for a strong school and family partnership, explain school policies clearly, and hear families’ hopes and dreams for their children. Families will also review and sign both our family contract(s) and student code of conduct. Staff members will spend one-third of **Summer Professional Development** internalizing our values, understanding how they impact our culture and academics, and practice techniques, systems, rituals and routines that put into action these values. In the first week of school, students will be explicitly taught and oriented to the values-based culture, systems, and routines of Vanguard

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<sup>48</sup> “A is for Audacity: Lessons in Leadership from Lorraine Monroe.” *Educational Leadership*. <http://www.ascd.org/publications/educational-leadership/apr04/vol61/num07/A-Is-for-Audacity@-Lessons-in-Leadership-from-Lorraine-Monroe.aspx>.

<sup>49</sup> <sup>35</sup> [https://ies.ed.gov/ncee/wwc/Docs/InterventionReports/WWC\\_Lessons\\_in\\_Character\\_090806.pdf](https://ies.ed.gov/ncee/wwc/Docs/InterventionReports/WWC_Lessons_in_Character_090806.pdf).

Collegiate. After the first week, these systems will be continuously reinforced and closely monitored by staff—both in classrooms and throughout our space, as to protect the integrity of instructional time. Weekly, we will have an all-school **Community Meeting** during which students will recite the school values and be recognized as individuals and classrooms for their ability to practically apply these values. Our weekly celebrations will strengthen school culture through building community, reinforcing core values, celebrating student academic achievement (absolute and growth), and recognizing positive behaviors.

**2. Typical Student Day. Arrival and Advisory.** At 7:30am, Andre arrives to school on a city bus. As Andre approaches the building, he sees the Executive Director waiting for him. “Good Morning, Andre!” says Mr. Marshall enthusiastically. “Good Morning, Mr. Marshall,” Andre responds. The two shake hands. Andre is prompted to show his belt and uniform shirt - a symbol of readiness for the day. “Thank you, sir. Make it a great day. Learn. Laugh. Remember why you’re here,” says Mr. Marshall, to which Andre responds, “College and beyond. Thank you.” As Andre walks from the main entrance to his classroom, he passes and is greeted by three staff members with a warm smile and “Good Morning.” Andre is also greeted at the door to his classroom by one of his advisory teachers prior to crossing the threshold of the classroom. “Good morning, Andre. Are we ready to make it a great day?” asks the teacher. “I am,” answers Andre. Andre enters the room and immediately puts his coat and book bag on his hook. Next, he submits his homework to the second advisory teacher. Andre takes breakfast and heads to his seat where he looks up and sees the “Do Now” on the board. It is a reflection writing assignment about the previous day’s advisory discussion about the school value Integrity, Andre begins working. At 7:48am, he hears a clapping chant led by the advisory teacher that signals the end of the “Do Now” and breakfast. Andre’s class comes to attention and sits in STAR (sit up straight, track the speaker, ask/answer questions, and respect), ready for **Morning Motivation**. Andre’s class engages in a 10-minute discussion about their writing assignment. At 7:58am, Andre’s teacher praises the classroom for their demonstration of Hard Work because she appreciates them working diligently for an extended period of time and explains how this value will help them on their way to college. She gives them one minute to prepare for the start of Reading. **Reading.** Andre and his classmates quietly organize their space including putting their class novel in the left corner of their desks as they have been taught. Immediately at 8:00am, class begins with the “Read Baby Read” chant. As Mr. Browner, the fifth grade Reading teacher, enters the room, the advisory teachers transition to their next class. During today’s reading class, they are analyzing character traits and character motivations in *Esperanza Rising*. At the end of the lesson, Mr. Browner assigns their new groups for the next week’s of **Reading Power Hour**, into which they immediately transition. Today, Andre is working with Mr. Browner on reading comprehension, and then independently on Achieve 3000. Following Power Hour is morning break at 9:50am, and Andre is excited because he remembered to bring a snack today. At the start of break, Andrew organizes his materials before he enjoys his snack. **Social Studies.** Following morning break at promptly 10:00am, Andre begins Social Studies. He and his classmates stand behind their desks and wait for Ms. Cooper to transition into the classroom as Mr. Browner transitions out of the room. After settling swiftly, Ms. Cooper says to the class, “I am prepared and ready to teach.” The class replies in unison, “We are prepared and ready to learn.” All students are seated. Ms. Cooper asks Andre to read the objective. “Students will be able to explain how the three branches of the United States Government allow for checks and balances,” shares Andre. He smiles with excitement because Social Studies is his favorite subject. As the lesson begins, Ms. Cooper recognizes that not every student is fully engaged. She states, “Class, I am about to cold call.” The students chant “Brrrrr!” while rubbing their shoulders as the movement and sound joyfully insinuates that they are cold. Andre’s best friend, James, is called. Andre knows James struggles with Social Studies, so he wiggles his fingers towards James to show silent support, and James’ answer is close, but he has to repeat the answer using the academic vocabulary learned in class. When he successfully answers, Ms. Cooper says, “You got it,” and then asks the class to give James two snaps and a “Good job.” The class complies and James feels accomplished, as he met academic adversity and demonstrated Hard Work. When Social Studies ends, students complete an exit ticket, used to ensure students have mastered the lesson. Ms. Cooper ends class by thanking students, “Thank you for learning,” to which the class responds, “Thank you for teaching.” **Science.** Science class starts promptly at 10:50am. Mr. Golden leads the class in its opening ritual, has two

students read the objective, and has the class begin the Do Now. Andre is struggling with the Do Now, and as Mr. Golden circulates the class, he notices Andre's perplexed look. He realizes that Andre has confused the mass and volume in the question, and Mr. Golden leans in and asks a series of three questions that help Andre call upon prior knowledge to find the correct answer. Andre writes a reminder note to himself with the formulas for mass and volume in the corner of his daily packet. As class progresses, he refers to it less and less. At the end of class, he does not need it to answer a question asked by Mr. Golden of the class. He smiles and feels a sense of pride. Class comes to an end. **Lunch.** Students silently transition to lunch in the cafeteria where they sit in assigned seats and wait patiently for their turn to go through the serving line. After each student is served, the Executive Director and supporting, non-teaching staff supervise lunch period during which they engage tables of students in "library level" discussions about books they are reading. As students finish eating, they are dismissed outside, where the school's Dean of Curriculum and Instruction (DCI) is waiting. Staff members transition outside with students as more classrooms are dismissed. Andre and his classmates spent the first week of school "practicing recess" and learning about the rules and expected behaviors for this time. All scholars are having fun with their free time, and there is a clear sense of organization and shared expectations. At the end, the Executive Director praises Andre for putting back athletic equipment that was not his own. "That's a merit for TEAM," he says. "We take care of our community because our community takes care of us. You remembered that true community requires service." Every class transitions back to their respective room to resume instruction. **Math Power Hour.** Following lunch, Andre has his Math Power Hour, which Andre loves. Today, he is working on Zeal and will be excited to speak to his tutor, who always provides strong strategies for how to solve problems. Andre works silently and diligently - so much so, that he is rewarded for his HARD WORK. **Writing.** Mrs. Edwards puts a slide on the board with today's writing prompt: "How is Esperanza responding to her father's death? What other evidence can you find in Chapter 3 that shows how Esperanza is responding?"<sup>50</sup> Andre was so engaged in his writing that he was startled when Mrs. Edwards announced it was time to transition to Afternoon Break. Andre could not wait for Afternoon Break to converse with his peers about what he had written so far. During the bathroom break (2:00pm), Mrs. Edwards walks students to bathrooms where they complete their bathroom break. Because students are so engaged in class and enjoying the book, she allows them to read more as they wait in line for the bathroom. Upon returning to class, students eat their snacks and, as Andre desired, continue conversing about their reading. **Math.** Andre's next class is math at 2:10pm. He and his classmates stand behind their desks and wait for Ms. Cooper to transition out of the classroom as Mr. Carr transitions into the room. After settling swiftly, Andrew completes his Do Now rapidly the first time through, but knows he needs to go back and check his work. As the lesson ends, Mr. Carr asked the students, "Please prepare to end the day strong. We have two more classes that will require you to exercise your biggest muscle—the brain." Andre knows immediately he is talking about Critical Thinking. As Ms. Cooper enters at 2:58pm for a 3:00pm sharp start, Mr. Carr completes his transition ritual. Ms. Cooper, who also teaches **Critical Thinking 1** and explains that today, the class will begin basic logic games and passes out a work sheet. Andre looks at the sheet and was immediately confused. The sheet had fruit in an equation! It said, "If (picture of a red apple) = (picture of a green apple)" on one line. The very next line said "Then, (picture of a green apple) = (picture of a red apple)." Ms. Cooper asked students to vote with their feet—to the right if they agreed with the statement, to the left if they disagreed, and in the middle if they were uncertain. Ms. Cooper instructed the class that this type of activity takes a high level of maturity. She also said, "We will respect each other's personal space and opinions at all times during this activity." As the activity unfolds, Andre learns the flaw in the logic from the equation on the sheet. She asks, "Now that I have explained this, does anyone want to change their vote?" Several students change. Ms. Cooper continues to lead the lesson about the valid argument forms Modus Ponens and Modus Tollens. Andre thinks to himself, "I cannot wait to use this at home with my big brother! He always wants to argue and never makes any sense." Following Critical Thinking, Andre and his classmates end the day with 40 minutes of tutoring. **Tutoring and Dismissal.** Yesterday, Andre worked with Mr. Browner to review the main idea skills they had learned in class. Today, he scored a 100%

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<sup>50</sup> <https://www.engageny.org/sites/default/files/resource/attachments/5m1.2.pdf>.

on his exit ticket; he will spend 20 minutes on his homework and 20 minutes on Achieve3000, finishing where he left off during Reading Power Hour. At the end of tutoring, it is time for dismissal—trash pick-up, chairs pushed in, cleaning their space. Mr. Browner quietly inspects the room. Once jobs are complete, all students are seated. Mr. Browner dismisses students in pairs to get their belongings. Once everyone has their items, and when given teacher direction, the class lines up and transitions to the community space. Students are lined up in sections of the community space based upon their respective modes of transportation. Andre takes the city bus and sits on the East side of the room. His friend James is a walker and sits on the North side. As Andre is called to be dismissed, he waves to James and exits the gym. Along his way to the bus stop, there are three staff members that wish him a good and productive evening.

**3. Typical Teacher Day.** Figure 9 outlines the typical day for a fifth grade Reading and Writing teacher.

**Figure 9: Sample Teacher Day**

<b>5<sup>th</sup> Grade Reading and Writing</b>		
<b>Time</b>	<b>Task</b>	<b>Description</b>
7:00	<b>Arrival</b>	Arrive at school, review intellectual preparation for the morning reading lesson, check on progress with Achieve 3000 for 4 students
7:15	<b>Staff Morning Huddle</b>	Participate in morning huddle, including practice of a taxonomy and shout-outs for teammates for demonstrating core values
7:30	<b>Student Arrival</b>	Welcome students w/bright smile, handshake, greeting at class threshold
7:50	<b>Morning Motivation</b>	Lead students in morning greeting, recitation of school values, daily news reflection, and positive affirmations
8:00	<b>Reading</b>	Teach first lesson of day, i.e. Students determine literal and figurative meaning of Langston Hughes’ “I Too” (Morehouse)
8:50	<b>Reading Power Hour</b>	Teach guided reading to group of 6 students, actively monitor other small groups ensuring students are on-task
9:50	<b>Morning Break</b>	Lead students through transition from classroom to bathroom; send students into bathroom three (3) at a time while monitoring student behavior in line and in bathroom; lead students back to classroom
10:00	<b>Writing</b>	Provide feedback for class on two most common errors on their creative writing drafts, circulate to conference briefly with students (Indiana)
10:50	<b>Reading</b>	Students determine literal/figurative meaning of Langston Hughes’ “I Too” (Indiana)
11:40	<b>Lunch</b>	Lead students to cafeteria for lunch, pick students up at end of lunch to bring back to class
12:10	<b>Reading Power Hour</b>	Teach guided reading to group of 6 students, actively monitor other small groups ensuring students are on-task
1:10	<b>Writing</b>	Provide feedback for class on two most common errors on their creative writing drafts, circulate to conference briefly with students (Morehouse)
2:00	<b>Break</b>	Lead students through transition routine
2:10	<b>Prep Period</b>	Meeting with DCI to review feedback from previous day’s observation.
3:00	<b>Prep Period</b>	Prepare for tutoring and tomorrow’s lesson.
3:50	<b>Tutoring</b>	Lead small student tutoring group based on Exit Ticket results
4:30	<b>Dismissal</b>	Monitor student pack-up, cover assigned post in hallway to ensure smooth transition

**Supplemental Programming**

**1. Summer Academy.** Summer Academy will be offered for two weeks each summer to support students in mastering skills not mastered during the standard school year. It is only for students that did not pass one or two core classes with a 70% or higher and/or who did not pass the ILEARN. It will operate 8:00am to 1:30pm. Lunch will be provided through partnership with local food rescue not-for-profit, Second Helpings. Successful completion of Summer Academy is determined by: (1) attendance – 100% attendance; and (2) earning at least 70% on final assessment(s). Funding Summer Academy (i.e. – teacher stipends, materials, etc.) is included in the Instructional Supplies and Materials outlined in the budget, **Attachment 15**. If Summer Academy costs are significantly more than anticipated, the Board will decide to draw from our contingency funds. Summer Academy dates are contingent upon when ILEARN scores are released. Based upon experiences of similar schools within the BES network, we expect that up to 20% of our students may need Summer Academy during our first year of operation.

**2. Extra and Co-Curricular Activities/Programming.** Daily, Vanguard Collegiate will offer co-curricular opportunities for students as outlined in **Figure 10**. We will provide field lessons outside of our school to enhance and supplement classroom academic experiences. Co-Curriculars will occur Monday through Thursday, 50 minutes each day, and will include coding, fine arts, physical education, and Critical Thinking in Year 1. Classes will be led by Co-Curricular teachers, as hired. In Year 1, content teachers will be assigned Co-Curricular courses. As our school grows to scale, we anticipate offering after school enrichment programs (4:30-5:30pm) led by teachers and external volunteers. These will be optional for students. Although no formal partnerships exist at this point, we will pursue relationships with the organizations in **Figure 10** for extracurricular activities. In Year 1, partnerships will be managed by the Executive Director and DCI. In subsequent years, responsibilities will be split between the DCI for academic-related partnerships and Dean of Culture for character development and enrichment partnerships.

**Figure 10: Potential Co-Curricular and After-School Partners**

Alignment to Program	Partner	Activity Description	Grade Level(s)
Critical Thinking	Indy’s Inner City Chess	Competitive chess and strategy	5-8
Character Development	The Bloom Project	Mentoring for at-risk males from business and community leaders	5-8
College for All Students	Indy Achievers	Fall/Spring HBCU college tours	8
Science/Math	IUPUI School of Informatics	Computing and coding	7-8
Dance	DJ Center for Youth	Hip-hop and Salsa dance classes	5-8
Character Development	Girls, Inc.	Building strong, healthy relationships takes practice and skills	5
Math	Indy Algebra Project	Mathematics literacy instruction to youth	5-8

In alignment with the Indiana Academic Standards, we will offer four (4) to six (6) annual field lessons. Funding for field lessons is included under “Field Trips” in the budget, **Attachment 15**. **Figure 11** displays the potential lessons and their academic alignment.

**Figure 11: Potential Field Lessons**

Academic Alignment	Location	Grade Level(s)
Science	Nina Mason Pulliam Ecolab at Marian University	5-8
Social Studies	Cincinnati Underground Railroad Museum	5-8
Science	Wonder Lab (Bloomington)	5
Social Studies	Indiana State House/General Assembly	7-8
ELA	Central Library	5-8
Science	Eagle Creek Ornithology Center and Earth Discovery Center	6
Fine Arts	Center for Performing Arts – Carmel, IN	5-8

**3. Student Mental, Emotional, Social Development & Health.** Vanguard Collegiate will create and maintain a culture of support for all students. We will partner with Indiana’s largest mental health care service provider, Adult&child (“A&c”), to support the learning process and enhance behavior. Goals for this partnership are to dramatically improve early intervention and access to mental health services for students in need. We will determine exact services in alignment with needs of students, and A&c will work together with teachers, our Student Support Coordinator and Dean of Culture, as hired, and the Executive Director to ensure students have access to mental health services. All staff will be trained to support students’ social and emotional development and trauma-informed practices including, but not limited, to coping skills, threat assessment, effective communication, and appropriate responses to crisis situations.<sup>51</sup>

**4. Student-focused Activities.** Character education and service learning are integral components of student success in high school, college, and life. Character education also allows students and adults in a school community to understand, care about, and act on core ethical values. Upon such core values, we form the attitudes and actions that are the hallmark of safe, healthy, and informed communities that serve as the foundation of our society.<sup>52</sup> This will be accomplished by the way we implement our core values, conduct Morning Motivation, execute weekly Community Circle(s), and will be displayed and measured by our students’ Capstone Project— Community Health and Impact Project In Neighborhoods (C.H.I.P. I.N.). **Weekly Community Circle.** Once weekly, the school will participate in Community Circle. An important ritual, it will be used to interact positively and collectively as a school body, recognize and celebrate academic and behavioral success, and communicate clear directions to resolve school community challenges. Adults model desired student behaviors, reinforce core values, teach/promote leadership (student-led portions), highlight Black and Latino history (adult-led portions), and support with socialization skills (large and small group activities). Weekly celebration allows us to embody and model the core values: **Team** – recognizing students who have taken extraordinary responsibility of the school community; **Hard Work** – recognizing extra effort by students and staff; **Integrity** – recognizing positive student behavior; **Nobility** – recognizing students who have shown honor; **Knowledge** – recognizing students who have shown growth and/or have demonstrated academic mastery. **Capstone Project.** Vanguard Collegiate scholars will be required to complete Community Health and Impact Project In Neighborhoods (“CHIP - IN”) as their capstone. Projects must meet a need in the community and be driven by the scholar(s). The project will begin in fifth grade with students learning the basics of project management from a community partner. In sixth grade, students will research the assets, needs, strengths, weaknesses, opportunities and threats of their target neighborhood(s). In seventh grade, scholars will take a service learning course on components of successful service, leadership, and project management. This class will be taught in partnership with ProAct Indy. In the second half of the school year, scholars will participate in a pitch fest where neighborhood organizations pitch their needs to the seventh grade class. A formal selection process will be implemented that includes, but is not limited, to students’ interests and capacity to complete the project; seventh grade also marks the beginning of the planning and proposal phases. The scope of the project, outline of work to be performed, and projected timeline will be submitted in writing. Students will work in small groups to complete the project beginning in eighth grade. Scholars will carefully manage the progress of their plans/timelines and adjust as needed. At the end, scholars will evaluate their project that will highlight success, lessons learned, and demonstrate the need met.

### **Special Populations and At-Risk Students**

**1. Plan to Serve Special Populations.** We recognized that all students who come through our doors will have unique and individual needs and we are committed to ensuring that we meet the needs of all learners, including students with IEPs, English Language Learners, students who are intellectually gifted, students with section 504 plans, and students who are at risk. The robust supports we offer to students, including small group instruction, blended learning, tutoring, and differentiated instruction, will support in bringing our mission to fruition, where all students are equipped with the knowledge and skills for success in high school

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<sup>51</sup> [www.traumaawareschools.org/Traumainschools](http://www.traumaawareschools.org/Traumainschools).

<sup>52</sup> <https://www2.ed.gov/admins/lead/character/brochure.html>.

and college. Vanguard Collegiate will comply with the federal Individuals with Disabilities Education Act and Indiana regulations by monitoring our special education program with fidelity. As necessary, provisions will be made to ensure each student receives the Free and Appropriate Public Education they deserve – in compliance with all Title II of the American with Disabilities Act of 1990 (ADA), the Individuals with Disabilities Education Act (IDEA), and Section 504 of the Rehabilitation Act of 1974.

**2. Special Education. Identifying Special Education Students.** We will provide the highest quality college preparatory education and necessary supports for scholars to be academically and behaviorally successful. We will ensure all students are provided a free and appropriate public education in the least restrictive environment.<sup>53</sup> Upon enrollment, we will meet with each family, during which we will ask families to identify if their child has an existing IEP or has previously received special education services. We will work with families to secure necessary documentation to ensure students receive required accommodations and modifications as quickly as possible following enrollment. Our Executive Director and Student Supports Coordinator, as hired, will oversee this process and work alongside general education teachers to ensure all students' needs are met. The Student Supports Coordinator will be a trained and certified special educator and ESL instructor. As a data-driven school, instructional practices integrate frequent, strategic academic monitoring of all students through nationally-normed assessments and our interim assessments. If assessments demonstrate a student is struggling academically, or we observe a student who is struggling behaviorally, we will act to meet the needs of that student using the Response to Intervention (RTI) approach. Response to Intervention (RTI) is a multi-tier approach to the early identification and support of students with learning and behavior needs. The RTI process begins with high quality instruction and universal screening of all children in the general education classroom. Students are provided with interventions at increasing levels of intensity to accelerate their rate of learning. These services may be provided by a variety of personnel, including general education teachers, special educators, and specialists. Progress is closely monitored to assess both the learning rate and level of performance of individual students. Educational decisions about the intensity and duration of interventions are based on individual student response to instruction. RTI is designed for use when making decisions in both general education and special education, creating a well-integrated system of instruction and intervention guided by child outcome data.<sup>54</sup> If the intervention plan is unsuccessful, not resulting in academic or behavioral improvement, we will meet with the child's parent(s)/guardian(s) and discuss potential next steps, including whether evaluation for special education eligibility and related services is needed, at which point written notice is provided to the student's parent(s)/guardian(s). The school will conduct testing, by an appropriately licensed staff member or external special education consultant. Once testing has been conducted and results are received, an eligibility meeting will be reconvened with the parent(s)/guardian(s), the Student Supports Coordinator, student's teacher, the Executive Director, and other appropriate staff. A decision will be made as to the student's eligibility for special education services. If the student is eligible, an Individual Education Plan (IEP) will be developed. Each IEP will be reviewed at least once in each school year and each student will be re-evaluated at least every three years. We remain highly attentive to student growth so that we are ensuring that our support and instruction are appropriate to ensure student academic progress. We will evaluate any student for a disability when a legal guardian so requests and will do so within five business days. Section 504 requires schools to provide students with disabilities appropriate educational services designed to meet the individual needs of such students to the same extent as the needs of students without disabilities are met. Section 504 prohibits discrimination on the basis of disability. We adhere to all obligations under IDEA and Section 504. We immediately evaluate and identify any students protected under Section 504. This includes any student determined to: (1) have physical or mental impairment that substantially limits one or more major life activities, (2) have record of such impairment, or (3) be regarded as having such impairment. The Special Education teacher serves as the Section 504 coordinator, ensuring students' legal rights are met and their special needs are effectively served. **Evidence-Based Instructional**

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<sup>53</sup> <http://www.doe.in.gov/specialed?page=1>.

<sup>54</sup> <http://www.rtinetwork.org/learn/what/whatisrti>.

**Programs.** We implement an inclusive, heterogeneous educational model serving all students. Our approach is based on the successful models of high-performing charter schools serving similar populations. We will ensure a full inclusion approach whenever possible to ensure each child is placed in the Least Restrictive Environment (LRE) by maximizing accommodations and minimizing modifications. Additionally, our small group instruction and blended learning programs will be tailored to meet the needs of students, and have been proven effective in like-minded and designed schools. **Evaluation and Progress Monitoring.** We look to assessments of students with disabilities receiving special education services, including improvements in performance on NWEA Map, ISTEP, interims, and teacher-created assessments to determine our program's effectiveness in improving students' academic performance and success in a college preparatory middle and high school. We disaggregate assessment results between students with disabilities and those without disabilities to continuously monitor and improve our special education program. The Executive Director, Dean of Curriculum and Instruction, and Students Supports Coordinator will support teachers to analyze data effectively by subgroup and provide strategies to differentiate instruction; the Leadership Team will evaluate the program effectiveness annually and make adjustments as needed for student success. **Promoting Graduation.** As students matriculate through Vanguard Collegiate, it is the school's goal to assist them in building transitional skills. This development will be directly outlined, monitored, sustained, and evaluated through a transitional IEP, written during a student's eighth grade year. As Vanguard Collegiate is a college preparatory school, the goal for all students including those with IEPs is to become college ready. Thus, each transitional IEP will contain goals that move students towards secondary and post-secondary success, course work that is rigorous in its preparation for students to perform well at each level, and connects students will outside resources to assist in their development. **Qualified Staffing.** Vanguard Collegiate will employ one certified and Highly Qualified Students Supports Coordinator in our first year of operation, growing to three Student Supports Coordinators at full capacity. At all times, we consider the needs of our students with special needs when staffing these roles and additional positions school-wide, and adjust our staffing plan per those needs. All staff hired to teach or supervise Special Education programming are required to be Highly Qualified and hold a license (or emergency certification) to teach Special Education in Indiana, and additional certifications or requirements per the state or Authorizer. In addition to our appropriately licensed and credentialed Special Education Teachers, the staff will be trained by certified specialist at both INSOURCE<sup>55</sup> and through other recommended institutions in practices and approaches to supporting special education students.

**3. English Language Learners.** We will implement an ELL program that complies with Federal Laws and regulations related to the education of language minority students as stated under Title IV of the Civil Rights Act of 1964 and the Equal Education Opportunities Act of 1974, as well as provides our ELL students with the instruction necessary for them to acquire and master English academic language skills. Our anticipated ELL population based on local school data is 10%.<sup>56</sup> English Language Learners will be held to the same academic and behavioral expectations and have access to the same academic programs, opportunities, and services as all Vanguard Collegiate students. English learners' needs will be met by using the Sheltered English Immersion Model (SEI). SEI is an approach to teaching academic content in English to ELLs in the same classrooms as native English-speaking students with supports from all core academic teachers, and staff appropriately certified and licensed to support ELLs, and school leadership<sup>57</sup>. In accordance with the Indiana Department of Education, to ensure that our program is serving ELLs effectively, Vanguard Collegiate will: Identify students as potential ELLs; Assess students' need for EL services; Develop a program which, in the view of experts in the field, has a reasonable chance for success; Ensure that necessary staff, curricular materials, and facilities are in place and used properly; Develop appropriate evaluation standards, including program exit criteria, for measuring the progress of students; and Assess the success

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<sup>55</sup> INSOURCE provides parents, families, individuals and service providers in the state of Indiana the information and training necessary to help assure effective educational programs and appropriate services for individuals with disabilities.

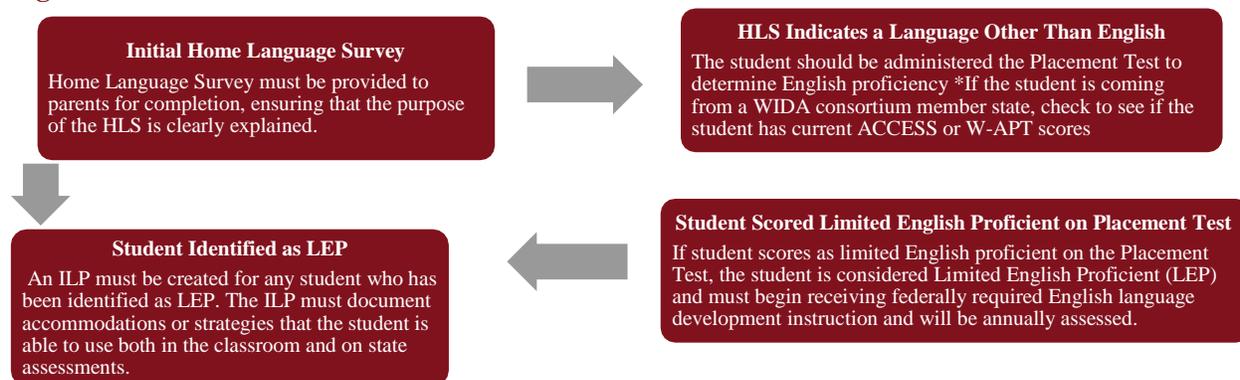
<sup>56</sup> Per research conducted by EdTec on behalf of Vanguard Collegiate.

<sup>57</sup> <http://www.mass.gov/edu/government/departments-and-boards/ese/programs/educator-effectiveness/licensure/endorsements/sheltered-english-immersion-endorsements-sei.html>.

of the program and modify it where needed.<sup>58</sup>

**Identifying English Language Learners.** We will administer the required Home Language Survey to first time enrollees, which will be administered only once in any student’s educational career. The survey results will be kept in the students’ files, regardless of languages recorded. If a student indicates a language other than English on their Home Language Survey, an English language proficiency test will be administered. This assessment occurs during an August-September assessment window and again January-February. We will use the WIDA-ACCESS Placement Test (W-APT), which assesses the four language domains of Listening, Speaking, Reading, and Writing. Based on the results, as well as observation using the WIDA Can Do Descriptors, the teacher determines the status of the student. If a student is identified as an English Learner, they are provided Sheltered English Immersion (SEI) instruction and developmentally appropriate instruction aligned to WIDA English language development (ELD) Standards Framework. We will develop an Individual Learning Plan (ILP) for students who score less than proficient in English language on the W-APT assessment. The ILP will include accommodations or strategies to support each student’s growth and acquisition of the English language. Our Executive Director and members of the designated support staff, including the Student Supports Coordinator, will meet with each child’s family to deliver in writing and review, in the parent’s preferred language, the child’s assessment results, an explanation of their child’s designation, a description of the program placement and method of instruction, a plan to meet the child’s educational needs, requirements for exiting the program, and the parents’ right to waive ELL services. **Figure 12** outlines the process Vanguard Collegiate will adhere to identify students as ELL.

**Figure 12: State of Indiana ELL Identification Process<sup>59</sup>**



The ILP is a school-developed form recommended to be created by the student’s classroom teacher(s) in conjunction with the school’s Student Supports Coordinator or another designee.<sup>60</sup> We will have one dual-certified, High Qualified Student Supports Coordinator who works with both our Special Education and ELL population. All qualified staff members that work with an ELL student will have a copy of the ILP and will implement it daily in the classroom. ELL students will also take an annual English language proficiency assessment levels over time, with sub-group levels in Listening, Speaking, Reading and Writing. Our dual certified Student Supports Coordinator teacher will assist classroom teachers in integrating the WIDA English Language Proficiency Standards into the content area instruction and to identify strategies to support students at all levels of English development, including but not limited to, (1) considering the student’s proficiency levels for each domain (listening, speaking, reading, and writing), interpreting data, and using it to drive instruction and (2) tracking students growth and ensure they receive accommodations on state assessments.<sup>61</sup> **Evidence-Based Programs.** Our instructional practices for ELLs

<sup>58</sup> <http://www.doe.in.gov/sites/default/files/elme/2016-2017-el-guidebook.pdf>.

<sup>59</sup> <http://www.doe.in.gov/sites/default/files/elme/2016-2017-el-guidebook.pdf>.

<sup>60</sup> Ibid.

<sup>61</sup> Ibid.

incorporate five strategies outlined by the Federal Department of Education as Doing What Works: screen and monitor progress, provide reading intervention, teach vocabulary, develop academic English, and schedule peer learning. These practices will be integrated into daily instructional practices through discourse, push-in vocabulary, small group literacy instruction, and cooperative learning and will be leveraged and increased with an ELL who may need additional support in English language acquisition. **Assessing and Monitoring Progress.** Students identified as ELL are assessed annually to determine improvement in English language proficiency (ELP). As member of the World Class Instruction Design and Assessment (WIDA) Consortium, Indiana uses ACCESS for ELLs to annually measure the ELP of ELLs statewide. We will use ACCESS and the WIDA Access Placement Test to screen English language proficiency of newly enrolling students identified as potential ELLs. We work to have all ELL students reclassified as quickly as possible and make this determination using ACCESS exam scores, input from the general education teacher, and evidence of general education progress. Additionally, we will regularly monitor progress of ELLs using our unit and interim assessments. Interim assessment data will be broken down by student subgroup, including our ELLs so that we are able to closely track and monitor progress through the school year. **Qualified Staffing.** The Student Supports Coordinator in charge of the ELL program will be an experienced teacher and will meet Highly Qualified requirements. This staff member will be responsible for the overall implementation and oversight of the ELL program, and will provide relevant professional development to administrators and staff. The goal for our ELLs is the same as that for all students – to be prepared for success in college and beyond. ELLs will be prepared with the linguistic and social skills necessary to excel in college and in life. To meet this goal, each ELL receives the linguistic and academic supports necessary for success. Responsibility for this educational support will be shared by the classroom teacher(s) of which at least one teacher per grade level will also have their ESL licensure.

**4. Students Performing Below Grade Level.** Student performance on the NWEA MAP, ISTEP, interim assessments, and teacher-created assessments will be analyzed and used to determine which of our students are performing below grade level. We will use our Reading and Math Power Hours to provide small group instruction to identified students in their target areas of need. We will also use our end-of-day tutoring time to support and remediate students performing below grade level. Students' weekly schedules in ELA Power Hour are tailored to their specific needs. Time spent with teachers ranges from phonics instruction to Fountas & Pinnell's Leveled Literacy Intervention curriculum (LLI) to Close Reading of text on or above grade level. Additionally, students will work from Achieve3000, a blended learning platform that allows students to work both at their individual skill level and pace. Students' weekly schedules in Math Power Hour are consistent across the week; interventions themselves are tailored to specific learning needs. Each week all students spend 120 minutes on Zeal, 60 on TenMarks, and 60 in teacher-led intervention, split across two 30-minute sessions. If students are not responding to interventions, we will proceed with RTI.

**5. Intellectually Gifted Students.** Students scoring in the top 15%, based on NWEA MAP scores and ISTEP are eligible for gifted and talented differentiation. To enhance their abilities, Vanguard Collegiate will provide students with extension course work and projects as relevant, ensure blended learning programs are adequate to accelerate their growth, in both mathematics and English Language Arts, and have students serve as mentors and tutors to students in their own grade, as well as to younger students who struggle academically. Vanguard Collegiate will ensure adequate staffing to meet the needs of our intellectually gifted students and will monitor progress using the NWEA MAP, ISTEP, and interim assessment data.

### **Student Recruitment and Enrollment**

**1) Student Recruitment Plan.** Vanguard Collegiate of Indianapolis is committed to recruiting students in our target 46222 zip code. We will ensure that all recruitment materials are accessible to families, including providing materials in both English and Spanish. The recruitment strategy of Vanguard Collegiate is implemented annually beginning in November of the preceding school year. Our efforts beginning this coming fall have a significant impact on our ability to start strong in our first year of operation and will build momentum for the years beyond. Our efforts are to recruit double our enrollment goal, totaling 120 fifth graders and 120 sixth graders begin immediately upon authorization. We will recruit a broad cross-

section of students and will employ a wide range of strategies to ensure all families, particularly those that may be less informed about school choice options, are aware of the opportunity to enroll with us. While active recruitment to submit applications will not begin until November, we have been spreading the word regarding Vanguard Collegiate for the last ten months, speaking with over 100 families, of which 40 sought intent to enroll forms. We will conduct the following recruitment activities which are intended to reach all students: Development and mass distribution of a simple application that only requires information which is necessary to conduct an open and transparent lottery; Paid and earned media advertisements (i.e., newspaper, radio, television); Collaboration with community partners - social service, religious, and civic organizations and businesses; Information sessions held in Haughville; Execution of a community immersion - door-to-door canvassing in densely populated residential neighborhoods and heavily trafficked commercial areas; Use of third-party mail house to distribute applications.

The area of 46222 is well-endowed with historical social service, youth development, and community focused organizations. We have and will continue to pursue relationships with several organizations, including, but not limited to, Christamore House, The Mary Riggs Center, Haughville Library, Haughville Neighborhood Association, Westside Educational Taskforce, Near West Community Development Corporation, and Indiana University Purdue University. Our recruitment strategy includes both broadcast and digital campaigns. Television, social media and internet banner ads are among the top three sources for parents seeking educational options for their children. We will pursue a four-month multi-media advertising campaign with WISH-TV, including monthly appearances in IndyStyle and a Facebook campaign. Additionally, we will receive advertisements on the station's website for all viewers to see. We will also pursue partnerships with both FOX59 and CBS4 to generate awareness. The station regularly provides public service announcement(s) and commercial(s) that will run throughout the year. Additionally, the station routinely visits community events and offers schools and other types of organizations to be highlighted on the Early Morning News and their Community Highlight segment. These services will be provided at no cost.

**Enrollment Policy.** Vanguard Collegiate will abide by all state and federal non-discrimination laws – admitting students regardless of race, color, national origin, creed, gender, ethnicity, sexual orientation, mental and/or physical disability, age, ancestry, special need, English language proficiency, and/or academic achievement. This is consistent in our enrollment policy, admission requirements, scheduled application period, admission lottery procedures, student waitlists, student withdrawals, student re-enrollment, and student transfers as outlined in **Attachment 7**.

### **Student Discipline**

**1. Discipline Philosophy.** Vanguard Collegiate will create and maintain a safe, structure, joyous, and academically challenging school environment. Rooted in our school's core values, our discipline policy is consistent, sets clear expectations, fosters community, and protects instructional time. Our policy is in compliance with applicable laws and regulations. It will be implemented with fidelity to ensure the success of our scholars.

In our highly-structured school environment, we hold students accountable to our expectations while simultaneously developing an achievement-oriented student community. Teachers plan engaging lessons and use school wide-systems and procedures to maximize instructional time and minimize confusion. Together, our staff place the highest value on student achievement and show students the path to success. We create a community where students learn and engage with difficult material, and where parents are our partners. We communicate frequently with families, reporting successes and challenges. The school staff enlists parents' help in modifying student behavior. We believe in a community where students know what is expected of them, using structure and predictability to allow students to feel comfortable, safe, protected, and included. This sense of community will come from showing and earning respect, and being firm and positive, even when issuing consequences.

Our individual discipline system is based on student choice. Students can choose to follow the rules and

abide by our core values, or they can choose to violate the rules, and therefore, receive a consequence. Vanguard Collegiate will implement a “Paycheck” system, modeled after that of BES school Intrepid College Prep in Nashville, TN and Uncommon Schools Roxbury Prep in Boston, MA. Within the school’s Paycheck system, students can earn “dollars” for demonstrating our core values, and “deductions” for violating the rules. For example, if a student supports another student prepare for an upcoming assessment by studying flashcards during lunch, they would earn a “dollar” for TEAM. If a student calls out in class without raising his or her hand, they would receive a “deduction” for a missed opportunity to display TEAM. This system supports scholars to internalize and demonstrate our values by focusing on small behaviors, which decreases the frequency of larger student misbehaviors<sup>62</sup>. Each week, students begin with 50 dollars in their paycheck, and if they earn a minimum of 35 by the end of the week, they will become a VIP member and can earn special rewards. This system also supports students to understand the basics of a bank system.

**2. Discipline Policy.** Please see **Attachment 8** for the school’s Discipline Policy.

**Parents and Community**

**Schools in the Target Location.** In 2014, then Mayor Gregory Ballard and the City of Indianapolis identified six neighborhoods as “hot spots” of violent crime and poverty: zip codes 46201, 46205, 46208, 46218, and 46222. In 2015, these neighborhoods, accounting for 4.7% of the population of Indianapolis, accounted for a disproportionate amount of Indianapolis’ criminal homicides. Compared to the rest of the city, twice the number of residents in these focus areas (30%) do not have high school diplomas, and Indianapolis residents have nearly three times the proportion of individuals with at least a college degree compared to those in focus areas (29% and 10%, respectively). Zip code 46222 was identified as one of the highest priority “hot spots” because of its high crime rates and levels of poverty, as well as low levels of educational attainment. Due to the severity of the needs of these identified communities and the lack of a stand-alone middle school in the area, Vanguard Collegiate is focused on zip code 46222. In Zip Code 46222, 10% of the population have bachelor’s degree or higher, while 63% have a high school diploma, and there is a 17% unemployment rate. **Figure 13** displays the public educational options in the 46222 zip code and their most recent Indiana Department of Education grade and state assessment scores for the last two years; of the eight schools in 46222, there are three charter schools. All the schools earned failing grades on the ISTEP exam, with a 52% passage rate being the highest. Two schools earned an “A” from the Indiana State Department of Education (Cold Spring School and Ernie Pyle School IPS #90). Although there are three K-8 schools in the area, there are no stand-alone middle schools in 46222.

**Figure 13: 46222 School Options and Performance<sup>63</sup>**

Schools of 46222					
Name	Grades Served	Type of School	2016 IN DOE Grade	2015 ISTEP Passing Rate (Math & ELA)	2016 ISTEP Passing Rate (Math & ELA)
Christel House Academy West	K-2	Charter	N/A	N/A	57.1%
Clarence L. Farrington Middle School #61	K-6	District	F	24.7%	15.6%
Cold Spring School	K-6	District	F	29.1%	21.5%
Ernie Pyle School #90	K-6	District	C	51.7%	41.4%
George Washington Community Middle School	7-8	District	F	9.3%	1.10%

<sup>62</sup> <https://www.hindawi.com/journals/tswj/2012/208907/> .

<sup>63</sup> The Indiana Department of Education. “Indianapolis Public Schools: 2015 Annual Performance Report.”

Indiana Math & Science Academy West	K-8	Charter	C	20.1%	20.9% <sup>64</sup>
Stephen Collins Foster School #67	K-8	District	D	22.3%	21.7%

Based on the Indianapolis Schools Needs Assessment conducted by IFF for the 2015-16 school year, at least 80% of the estimated enrollment for each site would likely come from the top 20 highest need areas. The Near Westside neighborhood (46222 and 46208), which has thirteen (13) traditional and charter public schools (only two of which are performing at an A or B level), needs a high-quality educational option specifically for middle school students.<sup>65</sup>

**2. Demand to Meet Enrollment Projections.** Our work was driven by a desire to not only garner genuine support from the communities we wish to serve, but to holistically understand its needs and incorporate solutions to them in the design of Vanguard Collegiate. We anticipate sufficient demand because (1) the lack of middle school options in the area and (2) the college-preparatory model we offer to students and families, including our small group instruction, extended time for literacy and math, and our focus on service is attractive to parents in the area. As we have canvassed the Haughville community, residents have expressed interest and support of our school model both verbally and in petition form.<sup>66</sup>

**3. Parent Engagement.** Building parent trust in your school is a prerequisite for student achievement.<sup>67</sup> The families of Vanguard Collegiate of Indianapolis will be genuine partners in the academic, behavior, and life success of our students. As a school, Vanguard Collegiate commits to communicating with families clearly and frequently, providing a safe school environment, ensuring structured classroom where students make significant progress in all academic areas, with a focus on reading and math. Parent involvement results in multiple benefits for students, including better social skills, higher attendance, and increased education rates.<sup>68</sup> We deeply respect our students’ families as partners and ensure strong communication and consistency in expectations between school and home. Before school begins, we meet with every family individually to explain expectations for students, families, and staff as well as to get the know the family and child. As outlined in **Figure 14**, the school will conduct **In-Home Conferences** and **Family Orientations**, send home weekly **Paycheck Reports**, and hold **Trimester Conference Nights** Vanguard Collegiate will also provide a monthly **Newsletter**, host **Family Nights** at the school, communicate regularly through both email and phone, and host coffee with the Executive Director. The school will hold an annual **Open House** where Vanguard Collegiate shares academic results with families, both to celebrate student achievement and outline areas of improvement.

**Figure 14: Parent Involvement Plan**

2018-2019 School Year Parent Involvement			
Connection	Description	Frequency	Staff
In-Home Conferences	New students/families will receive a visit to review them school’s mission, expectations, review the school contract, and a complete a student self-efficacy assessment.	Annually March – July	Executive Director
Family Orientation	Orientation will include such topics as school uniform, transportation, homework expectations, the school’s academic program, etc.	July	Executive Director DCI
Paychecks	Electronic reporting on scholars’ individual academic progress and behavior.	Weekly	Executive Director Dean of Students

<sup>64</sup> Now closed.

<sup>65</sup> 2017 IFF Demographic and Impact Analysis.

<sup>66</sup> Available upon request, as it contains personal information for signees.

<sup>67</sup> Wherry, John H. *Parent Involvement: 9 Truths You Must Know*. The Parent Institute. 2010.

<sup>68</sup> <http://www.edutopia.org/pdfs/edutopia-home-to-school-guide.pdf>.

Trimester Conference Nights	Parents will receive a hard copy report card that details grades and performance and meet with each teacher to discuss student performance.	End of Trimester	All Staff
Coffee with the Executive Director	All families will be invited to attend Coffee with the Executive Director to hear important school updates, ask questions, and provide feedback.	Monthly	Executive Director
Family Nights	Family nights support parents in learning techniques to supplement their child’s learning.	4 per year	DCI Teachers
Newsletter	Families will receive a newsletter that includes school updates, upcoming events, awards/ recognition, and academic resources.	Monthly	Executive Director Operations Staff
Phone Calls/Emails	Vanguard Collegiate will communicate with parents and families about academic and behavioral achievements, as well as, challenges.	As needed	All Staff

Vanguard Collegiate of Indianapolis parents will demonstrate satisfaction with the academic program and communication, measured by an **Annual Survey** on parental satisfaction with the school’s academic program, family communication, and overall satisfaction. Surveys will be given to families at the second trimester conference meetings and results will be used to make improvements to the school. The Executive Director will report findings to the Board of Directors.

**4. Community Resources.** Realizing that (1) educating students is our number one priority and (2) our students come from a wide array of social economic and health backgrounds determined by circumstances beyond their control, Vanguard Collegiate will seek referral relationships with local organizations and businesses that can meet the needs of our families—especially in ways that mitigate barriers to academic success. To that end, we will pursue a partnership with the IUPUI School for Social Work to host student(s) for their practicum to work alongside our staff. One of their tasks will be to create, maintain, and update a resource binder that allows us to connect families to services such as, but not limited to, shelters, food pantries, health care providers, clothing assistance, job training, and recidivism. The resource binder will be a living document; thus, as we build new organizational relationships, we will update the resource.

**5. Evidence of Demand.** Please see **Attachment 9** as evidence of demand from the community, evidence of community engagement, and evidence of support from community partners.

**Performance Management**

**1. Performance Indicators.** Data-driven, high-performing schools use rigorous, regular assessments to inform their instructional and student support decisions. Vanguard Collegiate of Indianapolis (Vanguard Collegiate) is committed to providing the best education possible to all our students, as well as, to be transparent in reporting our results to our community and stakeholders alike. In addition to the ICBS evaluation metrics and criteria, Vanguard Collegiate will track progress in the areas outlined in **Figure 15**.

**Figure 15: Performance Indicators**

Performance Indicators	
Connection	Description
Academic Performance	<p><b>Goal 1:</b> Students will demonstrate growth in both reading and mathematics.</p> <p><b>Measure 1:</b> In a cohort analysis of longitudinal growth, students, on average, will have a minimum of five percentiles of growth per year in ELA and Math on the NWEA MAP until the average percentile score reaches 75%.</p> <p><b>Goal 2:</b> All students will reach or exceed grade level proficiency in ELA and Math by end of 8<sup>th</sup> grade.</p> <p><b>Measure 2:</b> In a cohort analysis of student grade level proficiency, all students will, at minimum, meet grade level proficiency in ELA and Math on the NWEA MAP.</p>
Attendance	<p><b>Goal 3:</b> Vanguard Collegiate of Indianapolis will have high rates of daily attendance.</p> <p><b>Measure 3:</b> School-wide daily attendance average will be 95%.</p>

Family Satisfaction	<b>Goal 4:</b> Parents will demonstrate satisfaction with the academic program and communication. <b>Measure 4:</b> As reported by an annual survey, average parent satisfaction with the school’s academic program and family communication will be 80% or higher.
Staff Satisfaction	<b>GOAL 5:</b> Staff demonstrate satisfaction with the academic program and professional environment at Vanguard Collegiate. <b>Measure 5:</b> As reported by an annual survey, average staff satisfaction with the school’s academic program and professional environment will be 80% or higher.
High School and College Graduation	<b>GOAL 6:</b> Students demonstrate high school and college readiness. <b>Measure 5.01:</b> 90% of students graduate from high school (as defined by the state’s four-year graduation rate). <b>Measure 5.02:</b> 90% of students who attend two years or more will enroll in post- secondary institutions or are employed within five months of graduation (includes military service).

**2. Assessments.** In order to effectively track student progress towards reaching our academic goals, Vanguard Collegiate is committed to assessing student performance regularly and will use the data from assessments to inform instruction both day to day and long term. **Exit Tickets.** At the end of each class, teachers will administer self-created quizzes (3-5 questions) aligned to the lesson objectives to check for student understanding and/or mastery. Data will be collected, analyzed, and used to determine (1) what tutoring sessions scholars will attend that day, (2) what additional supports a particular scholar may need, and (3) if a lesson needs to be re-taught or an objective/skill taught/practiced more. **ILEARN and End-Of-Course assessments (ECA).** We will compare students’ results are compared to those in other schools, districts, and across the state. ILEARN and ECA are administered in accordance with timelines and guidelines set by the Indiana Department of Education. We fully administer ILEARN assessment including the ELA, Math, Science, and Social Studies tests using the Applied Skills and Multiple Choice assessments for the appropriate students. Data from both end of course assessments and ILEARN will be used to inform long-term instructional planning. **Norm-Referenced Assessments.** Vanguard Collegiate will administer the Northwest Evaluation Association Measures of Academic Progress (NWEA- MAP) assessment three times annually. The NWEA-MAP compares test taker’s performance against the performance of same-grade peers nationally. Performance is expressed in a student’s percentile rank grade- level equivalent. Results will be used to measure the growth of a student, grade level, and the school wide performance over time. Additionally, the results provide school leadership with a tool measure teacher effectiveness against student learning. **Reading Level.** Vanguard Collegiate administer the Fountas and Pinnell reading assessment to measure student reading fluency, accuracy, phonemic awareness, and comprehension. The results will be used to set student goals for growth and supports for students, including groupings for Reading Power Hour. The assessments are administered six (6) times per year for all students. Students, parents, and teachers will be aware of students reading level and associated goals. **Interim Assessments.** Vanguard Collegiate’s leadership team will design and oversee teacher execution of periodic exams using questions that (1) mirror a standardize tests format and (2) are aligned with the Indiana Academic Standards to measure student mastery of the standards. The assessments will be conducted at the midpoint and end of each trimester primarily in ELA, Math, Social Studies, and Science. Results will be analyzed by teachers with school leaders, including analysis of sub-group populations, resulting in pivots in instruction to ensure student mastery of content standards, as well as the appropriate student supports are in place. Tests will be administered at a minimum of five (5) times per school year. Test revisions, as needed, will be made annually by the Dean of Curriculum and Instruction. **Non-Academic Assessments. Surveys.** At Vanguard Collegiate, we not only value our relationships with families but also their input for us as a school. Annually, we will administer a survey on parental satisfaction with the school’s academic program and communication with the school. The surveys will be both qualitative and quantitative in design and the results will be used to make overall improvements in our relationships with families. We will also administer a staff survey annually, that allows staff to provide feedback on our academic program as well as their overall professional satisfaction. Results will be used to improve the school program and to ensure strong staff retention.

**3. Data Collection and Analysis. Assessment Data.** Vanguard Collegiate is committed to utilizing data regularly to inform instruction so that students are able to reach ambitious academic goals.<sup>69</sup> We analyze data at the yearly, trimester, weekly, and daily levels and have clear systems for flexibly responding to data. At the mid and end-point of each trimester, students take interim assessments that are backwards mapped from our state and end of year assessments. Data from these interim assessments are collected by teachers and school leadership by question, standard alignment, and student response. Following each interim assessment, teachers, with the support of school leadership will deeply analyze data during full day Data Days, during which they analyze scholar work, discuss trends, set goals, and action plan to ensure all students are on track towards mastery. There are a minimum of five (5) data days each school year, as outlined in our Annual Calendar. Additionally, teachers will collect, analyze, and use data to drive instruction with weekly quizzes and daily exit tickets given in each course. Performance on interim assessments will be discussed by the Board Academic Achievement Committee, and reported to the board monthly. The results from these assessments will be use to inform tutoring groups, and will be discussed with the Dean of Curriculum and Instruction. **Survey Data.** Annual survey data will be collected and analyzed by school leadership, and presented to the board on an annual basis.

**4. Student Information Systems.** We will use School Runner as our Student Information System. Teachers will have access to relevant data for their current students; administrators will have to access global school data. Our leadership team will work during our planning year to ensure all necessary training has taken place prior to the arrival of staff and students, so that we can effectively train teachers and staff to input student achievement data. The system was chosen as it can streamline all needed functionalities across the school including attendance, grades and assessments and can create progress reports for families.

**5. Support and Training.** We will provide data analysis training for all staff members during **Summer Professional Development** prior to school starting and throughout the school year during five (5) Data Days and six (6) full day professional development days, and a weekly two-hour Friday Professional Development. We will partner with Thomas P. Miller & Associates to train staff on the principles of data analysis. This training will occur once during Summer Professional Development and twice during the school year.

**6. Corrective Actions.** In the event Vanguard Collegiate fails to meet our student achievement goals, or a goal established by the Indiana Charter School Board or Indiana Department of Education, the Board would convene a task force to investigate, address, and effectively problem-solve with management the lag in student achievement. The task force would aim to identify the root of the problem, through its Academic Achievement Committee, work with the Executive Director to create an action plan, and present the plan to the Board for approval. The board would closely monitor progress towards goals stated in the action plan and ensure the schools has the necessary financial and professional resources to achieve the stated goals.

### **SECTION 3: IMPLEMENTATION PLAN**

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#### **Legal Status and Governing Documents**

**1. Governance Documents. Attachment 10** includes:

- a) 501(c)(3) Determination Letter (Letter 947) from the Internal Revenue Service (“IRS”) or evidence that the applicant has applied for federal tax-exempt status from the IRS acknowledging receipt of the exemption application (IRS Notice 3367).
- b) Articles of Incorporation
- c) Board Bylaws
- d) Code of Ethics policy
- e) Conflict of Interest policy

**2. Bylaws.** Including clause pursuant to IC § 20-24-3-3, the Bylaws can be found in **Attachment 10.**

**3. Statement of Assurances. Attachment 11** includes the completed Statement of Assurances.

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<sup>69</sup> Rising Student Achievement Data to Support Instructional Decision Making. National Association of Elementary School Principals, 2011.

## Human Capital

**School Staffing Structure.** Year 1 and Full Capacity Organization Chart can be found in **Attachment 12.**

### School Leadership & Staff Hiring, Management and Evaluation

**1. Staff Recruitment and Hiring.** Vanguard Collegiate firmly believes that high-quality instruction is key to high levels of student academic achievement. To that end, we will recruit, hire, train, and retain top talent.<sup>70</sup> We will leverage partnerships that we have already begun to establish both locally and nationally to ensure our candidate pool is robust; partnerships include Teach For America, Leadership for Educational Equity, Teach Plus, Stand for Children, the Network for Quality Education, Indiana University Purdue University School of Education, University of Indianapolis' Professional Edge Center, Marion University's Educators College, and the Indianapolis Urban League. We will build relationships with the and the Indianapolis Black Alumni Council (support system for recent graduates of Historically Black Colleges and Universities). As an experienced non-profit executive and BES Fellow with local, regional, and a national network of resources established, proposed Executive Director Robert Marshall is positioned well to access these networks to identify and recruit mission-aligned, high-quality talent. With a goal of having 100% of our founding staff hired by May 1, 2018, our recruitment process began in the summer of 2017 through spreading the word to educators, locally and nationally, about Vanguard Collegiate's mission and vision (see **Attachment 9**). We are actively recruiting candidates who believe that all students deserve a quality education, have the capacity to learn, can achieve post-secondary attainment and academic success, and must be held to high expectations that they are supported to reach, and who believe that data drives curricular and instructional decisions. Immediately upon authorization, our recruitment and hiring efforts will be a major priority in the work. To date, Vanguard Collegiate has engaged with numerous educators, of whom six have expressed meaningful interest in applying for employment. Additionally, Vanguard Collegiate has allocated \$5,000 for staff recruitment. This will include funds for electronic job postings through a variety of platforms, participation in recruitment events, covering travel expenses as required for interviews. The formal hiring process is outlined in **Figure 16**. All hiring decisions for the founding year will be made by the Executive Director, with the support of the Dean of Curriculum and Instruction, as hired. Pursuant to federal and state law, Vanguard Collegiate will hire highly qualified candidates for all positions. Qualifications such as academic transcripts, certifications, and national criminal background checks will be verified prior to employment. All documents verified for employment purposes will remain on file. Per Vanguard Collegiate's slow-growth student enrollment model, we will grow our staff as enrollment demands.

**Figure 16: Hiring Process**

Phase	Details
Resume Screen	School Leadership Team will use a formal rubric to inform the decision on which candidates will move in the process. <sup>71</sup>
Phone Interview	Candidates will participate in phone interview w/Executive Director. In general, most specifically sought in interview process, candidates must (1) take feedback well, (2) conduct themselves professionally, (3) be mission-aligned, (4) have content expertise.
In-Person Interview	Candidates are brought into the school for an interview with the School Leadership Team followed immediately by completion of a sample lesson. The DCI will look at classroom management techniques, content knowledge, and standards alignment as the Executive Director evaluates mission fit, content knowledge, interactions with students, communication skills, aptitude, and growth mindset.
Reference Check	A member of the Leadership Team will contact a minimum of three (3) references submitted by a candidate.

<sup>70</sup> *Teachers Matter: Understanding Teachers' Impact on Student Achievement.* <http://www.rand.org/education/projects/measuring-teacher-effectiveness/teachers-matter.html>.

<sup>71</sup> As part of FOS, BES will provide supporting and coaching in the hiring process.

Employment Offer	Candidates receive a formal, written offer of employment contingent upon successful completion of background and credential check.
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**2. Staffing Plan.** Personnel costs, benefit costs, and employer liability costs are approximately 57% of the anticipated spending during the first five (5) years for Vanguard Collegiate, or an average of \$5.4K in spending per student per year. We recognize that our mission will be achieved through high-quality teaching. **Attachment 12** outlines all reporting relationships in our staffing model. During Year 1 of operation, our Leadership Team consists of the Executive Director and Dean of Curriculum and Instruction. Administrative support will be provided by an Office Manager. This lean leadership team allows for investment in our teaching staff, including six (6) classroom content teachers and one (1) Student Supports Coordinator, certified in Special Education and ESL.

**3. Performance Evaluation.** Vanguard Collegiate’s core values guide our expectations that apply to teachers and students alike. We believe performance evaluations are a means to measure impact and professional growth, and hold all parties accountable for their role in fulfilling the promise made to students through our mission. **Executive Director Evaluation.** As outlined in **Section I**, the Executive Director will be evaluated annually by the Board of Directors. Performance indicators for the Executive Director evaluation are outlined below in **Figure 17**.

**Figure 17: Executive Director Evaluation Criterion**

Criterion	Description
Mission and Vision	Decisions made demonstrate commitment to mission; successful implementation of academic program; and execution of the accountability plan
Academic Outcomes	Meeting or exceeding academic goals established in accountability plan
Organizational Health	Effective financial planning and management, effective community outreach towards enrollment goals and mission-aligned partnerships/support overall organizational growth, and successful execution of organization’s strategic plan
Leadership	Successful recruitment, development, and retention of high-quality staff; effective communication with and responsiveness to authorizer and board

**Staff Evaluation.** Performance evaluations will be conducted semi-annually (mid-year and end-of-year) using a standard rubric for Vanguard Collegiate staff to be developed based on best practices of Uncommon Schools (New York) <sup>72</sup>and the Indiana Department of Education’s Rise Rubric. Staff evaluations will include a self-evaluation completed by each staff member, a performance evaluation completed by each staff member’s supervisor, and an evaluation meeting. The performance evaluation is rooted in data from class observations, student performance data, one-on-one meetings, coaching sessions, performance improvement plans, and corrective action forms executed as applicable. **Figure 18** defines the teacher evaluation criterion as defined by Indiana Department of Education’s Rise Teacher Evaluation Rubric:<sup>73</sup>

**Figure 18: Teacher Evaluation Criterion**

Criterion	Description
Absolute Achievement	Aligned with school academic accountability plan
Student Growth	Aligned with school academic accountability plan
Classroom Culture	Establishes a culture of error <sup>74</sup> , adheres to school disciplinary procedures, commands 100% participation, and demands answers using academic language and in complete sentences

<sup>72</sup> Per researchers at Stanford University, Uncommon Schools students make the greatest academic gains of any large charter network in the country (7 months in math and 4 months in reading of additional learning per year). <http://www.uncommonschools.org/results-for-charter-schools>

<sup>73</sup> <http://www.doe.in.gov/sites/default/files/evaluations/rise-rubric-2-0-final.pdf>.

<sup>74</sup> A Culture of error is a classroom culture that respects error, normalizes it, and values learning from it, is one of the characteristics of a high-performing classroom. It has four key parts: expecting error, withholding the answer, managing your tell, and praising risk-taking.

Rigorous Content	Aligned with Indiana Academic Standards for grade level and beyond, cognitive load on students, cross-curricular, and pushes students to their intellectual best self
Professionalism	Strong attendance record, arrives on time, follows school policies, and respects students, parents, peers and supervisors
Planning	Uses exit ticket and assessment data to plan, units aligned with Indiana Academic Standards, accounts for student misconceptions, and sets SMART goals for units
Effective Instruction	Develops student understanding and mastery of content <sup>51</sup>

Prior to formal evaluations, teachers will be made aware of their opportunities for improvement as part of the evaluation cycle. Each teacher will receive weekly classroom observations followed by a weekly observation debrief and action-planning meeting. Frequent observations and meetings will allow to discuss individual growth and strategize on ways to best meet student needs and drive student outcomes. At Vanguard Collegiate, we are committed to growing teachers and teacher leaders. To that end, each staff member will meet with the Executive Director to discuss short and long-term career goals, and as applicable, Vanguard Collegiate will support teachers with their pursuit of teacher leadership. For example, for a Founding Teacher, this may include identifying them potential prospect for future Dean of Culture position. Once identified for this type of leadership, the Executive Director will work closely to support the teacher’s growth on that trajectory. It may also include benchmarks for their classroom connected to student behavior and opportunities to shadow positions that have the responsibilities the teacher is seeking. Although it is not a guarantee of promotion, it is an intentional investment in all employees to see them grow and provide them something personal and professional to works towards.

**4. Unsatisfactory Performance and Turnover.** Vanguard Collegiate will evaluate each staff member based upon their performance and own merit. The semi-annual evaluations will be transparent and adhered to with fidelity. All employees will receive frequent feedback on their performance and subsequent coaching. Coaching may include, but not be limited to, one-on-one meetings, video observations with feedback, in-class observations, live-coaching, and practice of skills within one-on-one meetings and weekly professional development sessions. When a teacher and/or leader consistently delivers unsatisfactory work, they will be placed on a performance improvement plan. The plan isolates behaviors and/or skills needed for desired improvement, sets standards and metrics for improvement in those areas, and establishes a timeline by which progress will be monitored and changes are expected. It may also call for outside professional development opportunities. The end goal is for Vanguard Collegiate to provide all employees with all the necessary tools, training, and opportunity to be successful as their success is directly connected to the academic success of our students. However, failure to improve may lead to corrective action, up to and including termination. The Executive Director will be evaluated annually and formally by the Board of Directors. The Executive Director evaluation may include suggested trainings, development resources, or a performance improvement plan if warranted. Vacancies and turnover are a fact of any work environment. Our goal is to maintain a 15% or less annual turnover rate, which is substantially lower than the national average. The U.S. Bureau of Labor Statistics has found that the U.S. voluntary turnover rate is 23.4% annually.<sup>75</sup> Vanguard Collegiate is pursuing support and partnerships with local universities that would include training, leadership practice, and opportunities for individuals to furthering their education through IUPUI’s School of Education and/or Marian University’s Educators College. Additionally, we will use the Gallup 12 Questionnaire on an annual basis to inform and guide the organization’s efforts to increase staff engagement. In instances of unexpected turnover, Vanguard Collegiate will use its leadership team to temporarily reinforce staffing needs. During that time, we will engage in a modified and expedited version of our standard hiring system. As a function of Human Resources, we will conduct exit interviews will all staff, using the data gathered to improve systems, practices, structures, and culture. Vanguard Collegiate of Indianapolis strives to be a choice employer among education institutions in our community.

[www.wiley.com/legacy/downloads/CultureofError\\_Ebook.pdf](http://www.wiley.com/legacy/downloads/CultureofError_Ebook.pdf).

<sup>75</sup> <http://www.gallup.com/businessjournal/106912/turning-around-your-turnover-problem.aspx>.

**5. Compensation System.** Our compensation system is competitive with neighboring school districts. We have budgeted, on average, \$5,000 per employee toward medical, dental, and vision benefits, which is assumed to increase year over year by 5%. All packages include a 3% match as required by TRF/PERF. Our school year calendar contains 26 total days of staff professional development (PD), which is described in detail in the next section. PD will support teachers in building skill, practicing techniques, and leveraging their leadership capacity to execute our academic programs with fidelity (more details provided in the Annual Professional Development section). Each year, we have allocated \$300 per FTE in the school budget for differentiated development for each staff member. Professional development will be used to improve adult culture and skills to target specific areas of growth necessary for staff to maximize their capacity to ultimately drive student academic performance.

### **Professional Development**

**1. Annual Professional Development.** Throughout the 2018-2019 school year, Vanguard Collegiate will provide a total of 26 professional development (“PD”) days for staff (8:00am – 4:30pm). PD days include 15 days of **Summer Professional Development** and 11 days throughout the school year dedicated to Data Analysis and Instructional Practices. Additionally, each Friday we hold an abbreviated school day, with student dismissal at 2:00pm, allowing for two hours of **Weekly Professional Development**. **Summer Professional Development.** Prior to the start of school, for three weeks, teachers and school leaders engage in professional development led by school leadership and external facilitators specifically designed to prepare for success during the first 60 days of school. Objectives for the first week of summer PD include building School Culture and living out the school’s Mission and Vision. This practice-based training is designed for teachers to internalize school policies, processes, and procedures, including but not limited to: arrival, student discipline, homework, school calendar and schedule, nutrition, transitions, bathroom breaks, dismissal, and overall school culture. The final two weeks will be focused on preparing for a successful start to the school year by focusing on taxonomy practice<sup>76</sup>, classroom management, alignment (horizontal/vertical) to Indiana Academic Standards, and internalizing lesson plans. Teachers will receive exemplar assessments, unit plans, and lesson plans for the 2018-2019 school year.<sup>77</sup> Providing this robust curriculum will allow teachers to focus on improving and honing their instructional skills with extensive practice-based professional development. Teachers will practice their lessons and receive in-the-moment feedback from both the Dean of Curriculum & Instruction and the Executive Director to ensure they are delivering excellent instruction to students. **Weekly Professional Development.** On designated Friday afternoons, student dismissal will occur at 2:00pm, allowing for professional development from 2:30-4:30pm. Based on student performance data and observations of classroom practice, school leadership will provide timely, relevant PD to address gaps or areas of growth. School leadership will meet weekly to plan and incorporate identified areas of growth into Friday’s whole group sessions. Examples of potential training topics include, but are not limited to, successful lesson planning techniques, including: identifying student misconceptions; classroom management techniques such as using non-verbal redirections; school systems practice such as arrival, dismissal, and transitions; advance use of teacher tools like exit tickets. Weekly PD will promote the continuous improvement of our staff; address staff skill gaps using data from both observations and student assessments; and promote a positive staff culture in alignment with our mission.<sup>78</sup> **Data Days.** Vanguard Collegiate will administer interim assessments at the midpoint and end of each trimester in all core-content areas (Math, Reading, Science, and Social Studies). Following each interim assessment, we will hold a professional development “Data Day” during which our staff will deeply analyze the data, and make decisions to further student growth. Each teacher will create a specific action plan based on the data for their content area with the support of school leadership. Action plans will include which skills and objectives to reteach and whether that takes place whole-group, in small groups, or with individual students. Additionally, we will look critically at student groupings during Reading and Math Power Hour,

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<sup>76</sup> TLAC – 100%, Positive Framing, Strong Voice, What to Do.

<sup>77</sup> Created by the Executive Director and Dean of Curriculum and Instruction with the support of BES FOS. See **Attachment 4** for development timeline.

<sup>78</sup> <http://www.centralluzon.com/content/view/202/9/>.

and adjust groupings per the data. Data will also be used to track which students are on track to reaching end-of-year goals. Data analysis will include a matched cohort analysis and yearly school goal-setting, as well as comparison of NWEA MAP scores and state standardized test results.<sup>79</sup> **Classroom Observations.** Teachers receive weekly classroom observations which include live-coaching in the classroom coupled with an in-person debrief during a weekly meeting. For new and/or challenged teachers, school leaders dedicate more time to observation and coaching in their classroom(s) to build towards the individual's mastery of core instructional techniques and fundamental skills. Teachers also engage in a minimum of one coaching conversation with a school leader weekly, during which the leader and teacher debrief on the observation feedback, and engage in work to support student achievement, tailored to the individual needs of each teacher. This coaching could include review of student work, analyzing video from a classroom observation, and practice of future lessons. Classroom-based feedback is an individualized complement to summer PD and weekly PD sessions.

**2. Leadership Professional Development.** Vanguard Collegiate recognizes the importance of professional development for all team members, including the leadership team and is committed to providing this professional development beginning in the fall of 2017. Mr. Marshall will continue to study high-poverty, high-achieving BES schools in Nashville, Chicago, New York, and Milwaukee to continue to finalize all start-up details for the school. In addition, Mr. Marshall and the Dean of Curriculum and Instruction will attend a minimum of one BES Weekend Warriors Series. All members of the school leadership team will study Freedom Preparatory Academy and the Collegiate School of Memphis<sup>80</sup> prior to the opening of Vanguard Collegiate. These schools, both in Memphis, TN, have informed the design of Vanguard Collegiate and were either founded by or supported through Building Excellent Schools. The leadership team will participate in ongoing professional development in alignment with their individual skill gaps and goals set for them annually. In the planning year and first two years of school operation, Vanguard Collegiate will have a dedicated leadership coach from Building Excellent Schools as part of its Follow-On Support program that will provide professional development to the Executive Director regularly. This support will include a minimum of eight hours per month of coaching and multiple school observations annually. A professional development plan for Mr. Marshall's planning year is in **Attachment 1**.

**3. Supporting Student Achievement.** An effective teacher is the single strongest school-based factor in student achievement. Teachers directly impact academic environment, course curricula, and pedagogical techniques used – all of which can dramatically affect student success.<sup>81</sup> Our professional development is designed to build teacher capacity. We are committed to growing teachers in in our school culture, school systems, curriculum implementation, and professionalism. PD establishes group norms, desired outcomes, and expectations for all staff members. It builds staff understanding of the organizational structure and both individual and group roles/responsibilities. PD content will be driven by student outcomes such as inconsistent pedagogy use, assessment output, and/or student misconceptions identified by exit tickets. Our teachers are expected to adapt instruction in ways that facilitate academic achievement of students<sup>82</sup>.

**4. Summer Professional Development Schedule.** Please see **Attachment 6**.

**5. Professional Development Calendar.** See **Annual Professional Development** and **School Calendar**.

**6. Professional Development Evaluation.** Vanguard Collegiate's academic outcomes are dependent upon the successful development of its teachers and staff. Evaluation of our professional development is an integral part of the design, development, delivery, and implementation of our professional development<sup>83</sup>. Every formal, internal professional development session conduct is required to have the following: (1) planning sessions that utilize student assessment, behavior, and school culture audit

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<sup>79</sup> The same students' achievement measured from year one year to the next on the same instrument.

<sup>80</sup> In 2016-2017, 11<sup>th</sup> and 12<sup>th</sup> grade students averaged higher ACT mean composite scores than TN and national averages.  
<http://www.collegiatememphis.org/apps/pages/act>.

<sup>81</sup> [www2.nau.edu/~facdev-p/TR/Factors.pdf](http://www2.nau.edu/~facdev-p/TR/Factors.pdf).

<sup>82</sup> <http://education.stateuniversity.com/pages/2252/Multicultural-Education.html#ixzz4fnDuvDJD>.

<sup>83</sup> Phillips, Jack J. and Patricia Pulliam. Handbook of Training Evaluation and Measurement Methods. Routledge. 1991.

information to guide session design; (2) participant survey focused on content, delivery, relevance, and learning; and (3) facilitator debrief session to conduct SWOT Analysis<sup>84</sup> and review survey responses. In addition, as part of annual school evaluation, surveys completed by staff, professional development will be included. The year-end survey data analysis will be reported to the Board of Directors.

### **Start-Up and Operations**

**1. Start-up Plan.** Please see **Attachment 13**.

**2. Transportation.** Vanguard Collegiate will not provide daily school buses. Our goal is to procure a facility within a neighborhood with a large concentration of students eligible for enrollment, thus allowing for students to walk to school or to take public transportation. We also expect families to drop off students. Our arrival and dismissal system was designed to prioritize student safety and maximize efficiency. We will solicit donations of gas cards and IndyGo passes to assist families in need. This effort will specifically target homeless students. In compliance with the McKinney-Vento Homeless Assistance Act, 42 USC 11431, we will support with transportation as needed. We will comply with the Individuals with Disabilities Education Act and 511 IAC 7-43-1 by contracting transportation services for qualified students as necessary. Throughout the school year, students will engage in field lessons. We have allocated \$2,400 for field lessons in Year 1. We will contract transportation services as necessary.

**3. Safety and Security.** We will develop a comprehensive, school-specific Health Plan, Safety Plan, and Emergency Action Plan that complies with federal and state regulations prior to school opening. The plan will require the purchase, maintenance, and proper usage of emergency supplies. Annually, staff will be trained on all procedures, including but not limited to, child abuse and sexual abuse awareness and reporting, CPR and First-aid, accident and incident reporting, fire/natural disaster/etc. drills and procedures, emergency response, warning systems, food service safety, traffic safety, etc. We will have policies to guide the administration of prescription drugs and other medicines. We are committed to a drug, alcohol, and tobacco-free learning and workspace; all are explicitly prohibited from school property. Modifications to each plan will be made as needed to maintain in compliance with all health and safety regulations.

**4. Technology Specifications and Requirements.** Not Applicable.

**5. Indemnification and Liability Insurance.** Please see **Attachment 14**.

### **Facility Plan**

To determine the financial feasibility of developing a new middle school to serve grades 5-8 with a capacity of 480 students, we have engaged the Illinois Facility Foundation (IFF), a non-profit with substantial experience assisting not-for-profit corporations in planning, constructing, rehabilitating, financing and assessing facilities. IFF has completed a demographic analysis of the potential neighborhoods where we seek to locate and an assessment of the impact the development of a new school would have on the gap in quality school service for students in each potential neighborhood. Their analysis includes financial pro forma and development budgets and space planning. The final site search and due diligence will include facility assessments, cost estimates, and lease negotiations. Although we have not secured a facility, we have identified three sites within our desired location that meet our programmatic, square footage, and access needs. Preliminary results are outlined below.

**2625 Lafayette Rd. 46222.** The community surrounding this site, northwest of downtown within Eagledale (Marian University) neighborhood, is high-density, high-poverty area, surrounded by lower density areas to east. Density suggests that most students attending potential middle school here would come from nearby areas of high-poverty (70% of students qualify for free or reduced lunch) and with a significant Spanish-speaking population. Within the inner ring area, 9% of children (475) speak English less than very well, per census data and might need additional support for English language; 25% of adults 25 and older in inner ring do not have high school diploma, suggesting many students would have limited academic support at

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<sup>84</sup> [https://www.mindtools.com/pages/article/newTMC\\_05.htm](https://www.mindtools.com/pages/article/newTMC_05.htm).

home. Outside of the Speedway School District, there are no high performing public schools serving grades K-8 in the inner ring area. The neighborhoods to the north and south in the outer ring areas are in the top ten areas of highest need in Marion County. Despite not ranking in the highest need areas, an estimated 600 students within the Eagledale (Marian University) community alone do not have access to seats in a high performing middle school. The service gap in the surrounding neighborhoods (aside from Speedway) are even larger, with only two non-Speedway schools in the entire attendance area achieving accountability scores of A or B. **1941 W. St. Clair St. 46222**. The St. Clair St. location sits within several high poverty neighborhoods; 82% of students in the inner ring are eligible for free or reduced lunch and 28% of adults lack a high school diploma. This location could also serve the roughly 250 English Language Learners within the inner ring area. While the overall density of students is lower than the Lafayette Rd. site, the St. Clair St. location would serve some of the areas in most need for a high-quality school. Approximately two miles south of the Lafayette Road location, this site is in the Near Westside neighborhood, is ranked 6th in terms of need for high quality middle school seats, is approximately 50% of the school’s capacity were it to be located here, and is estimated to serve highest need areas of Marion County. The Near Westside neighborhood, with six public schools (only one of which, William Penn School 49, is performing at A or B level) needs an additional 800 high quality seats in grades 6-8 to close the service gap. In addition to these facilities, we have engaged in conversations with both Goodwill Educational Services, Providence Cristo Rey High School, and Head Start concerning possible co-location options. The Scope of Work commenced in January 2017. The site search and due diligence phase will commence upon receipt of authorization. The full scope of work is outlined in **Figure 19**.

**Figure 19: Facilities Timeline**

<b>Date</b>	<b>Action</b>	<b>Responsible Part(ies)</b>
December 2016	Toured two facilities in target community	Lead Founder
Jan-June 2017	Ongoing facilities tours on Westside	Lead Founder, Founding Board Member, IFF Representative
June- December, 2017	Monthly board updates on facilities progress; Monthly facilities committee meetings	Facility Committee, IFF Representative
August 2017	Site Schematic Design and scope of work; Preliminary Cost Estimates; General Contractor preliminary interviews	Facility Committee, Architect, IFF Representative
August-September, 2017	Select top two sites; Revised Schematic Design and Cost Estimates Letters of Intent on top two options; General Contractor RFP and selection	Facility Committee, Contractors, IFF Representative
September 2017	Form Facility Committee (3-4 people max)	Founding Board members, Lead Founder, Community Members
November 2017	Architect Selection Process: RFPs, Interviews, Contract negotiation, Architect Selection	Facility Committee, IFF Representative
November 2017	Negotiate lease/purchase terms on top site; revise cost estimates; proceed with Design/Development on top site	Lead Founder, IFF Representative, consultants
November-January, 2017	Begin loan conversations with lenders- CDFI’s, banks, etc. Construction Documents submitted for permitting Project goes out for bid	Architect
January 2018	Execute lease; Close loan with project lender (if loan is necessary)	Facility Committee, Full Board, IFF
Feb-May 2018	Project construction on tenant and site improvements Furniture, Fixtures, and Equipment Selection and Procurement	Facility Committee, Full Board, IFF Representative, Executive
June 2018	Obtain Certificate of Occupancy	Executive Director

June 2018	Staff and Furniture Move-In	Executive Director
August 2018	School Start	Executive Director

In his role with the Center for Leadership Development, Lead Founder and proposed Executive Director Robert Marshall worked within these neighborhoods conducting youth development programming and outreach. On behalf of this charter proposal, he has executed outreach within the areas to engage residents, organizations, and clergy to (1) learn their desires and concerns related to education, (2) build support and awareness for Vanguard Collegiate, and (3) support the community in its goals for their children. Mr. Marshall has managed facilities, including but not limited to, a 42-acre park with a family center and aquatics center, as well as a 20,000+ square foot youth facility. In each of those roles, he earned a food safety license from the Marion County Health Department and successfully completed multiple food safety inspections. He has a track record of success in passing all Occupational Safety and Health Administration and Fire Marshall inspections. He has also been part of both a leadership team and a board that completed structural renovations within all financial parameters and timelines and in compliance with all statutory requirements. All Vanguard Collegiate utilities estimates and other expenses are included in the budget found in **Attachment 15**. As a public school, our facility will meet all ADA and safety requirements.

## **Budget and Finance**

### **1. Financial Systems and Processes**

To remain faithful and good stewards of the public and private funds entrusted to the school, Vanguard Collegiate will develop internal financial management systems that adhere to Generally Accepted Accounting Principles (“GAAP”), use the accrual-basis method of accounting, and follow all relevant policies as required under Indiana statute by the Indiana State Board of Accounts. All systems will be timely, executed with fidelity, and will produce accurate information. **Accounting.** Our accounting system will be designed to collect, store, manage, process, retrieve and report its financial data so that it can be used by accountants, consultants, business analysts, managers, auditors and regulatory and tax agencies. The information reported will be used to evaluate the organization’s overall financial health and stability, cash flows, and inform decisions such as but not limited to purchasing, accountability, and budgeting. The Board is responsible for the approval of the operating budget. The Executive Director is responsible for oversight and management of the budget. The Board must approve any purchases over \$10,000. In such instances, it will be required for the Executive Director to secure a co-signature from either the Board Treasurer or the Board Chair. Purchases over \$50,000 must be sent out to bid, requiring an RFP. Although the Executive Director will review all proposals and make recommendations to the Board, the Board is responsible for contractor selection. **Payroll.** An independent, third-party back-office service provider will execute the payroll process for Vanguard Collegiate. This includes but is not limited to related tax, retirement, and other disbursements. RFPs for this service will begin immediately upon authorization.

**Financial Audit.** The Board of Directors is responsible for ensuring that the organization’s internal and external financial controls meet or exceed GAAP standards and protect it from financial fraud, mismanagement, and/or negligence. This includes retaining the services of an independent third-party CPA firm to annually audit the organization’s financials. This process includes, but is not limited to: Interview with said firm to explore scope of work, commitment involved, contributing extenuating circumstances that may impact work, and potential conflicts of interests. Both parties must come to an agreement concerning the work; In preparation for audit, Vanguard Collegiate is responsible for completing trend analysis and assessments of internal controls, risks, and financial statements. Results will guide subsequent audit; Auditors will spend time within school reviewing data, interviewing staff, and testing financials. Analysis of results will be completed, comparing processes to GAAP; CPA will issue an official opinion on the school’s audited financials that will highlight strengths, opportunities for growth, and glaring concerns.<sup>85</sup> Audit results will be presented to the Board. Based upon results, the Board will make recommended

<sup>85</sup> <http://smallbusiness.chron.com/6-phases-financial-statement-audit-3775.html>.

resolutions to the Executive Director in a corrective action plan for significant concerns. The audit and plan will be submitted to the Indiana Charter School Board by their established deadline. **Internal Controls.** To protect the organization against fiscal fraud and error, Vanguard Collegiate will provide safeguards such as segregation of duties, ensuring that different individuals prepare, sign, and record all financial details and payments, and providing for all necessary checks and balances. The policies goals are accuracy (reporting revenues and expenditures) and stewardship. **Restricted Access.** Only authorized personnel will have access to moveable assets such as cash, computers, etc. **Document Control.** All accounting-related documents will be initialed, dated, recorded, and filed. **Records Retention.** In compliance with GAAP, all auditable financial documents, records, and/or accounts will be accurate, maintained for a period as designated by IRS regulations, grant requirements, and other legal requirements as needed. Our legal counsel, back-office provider, and administrative staff will participate in an audit process to secure an unqualified opinion and determine process changes as necessary. **Processing Controls.** We will institute processing controls such as source document matching and general ledger account code examination to find errors prior to them being posted to the general ledger. **Reconciliation Controls.** All financial records will be stored in a minimum of two places to be reconciled against each other to ensure accuracy (i.e., the money being spent matches the money leaving an account) and adherence to financial policies/procedures in an established recording period. For example, examining the general ledger as a whole to ensure that all accounts are being aggregated into the financial statements.<sup>86</sup> **Security of Financial Data.** We recognize the importance of protecting financial data and preventing unauthorized access to it as a priority. Our accounting software will be restricted to the use of the Executive Director and back-office provider only in Year 1. In Year 3 and beyond, the Operations Manager will also have access. Individuals will receive their own specific login ID, as well as a password required to be changed periodically. A locked, secure cabinet will be procured to store all hard copies of sensitive financial data. **Risk Assessment.** We will develop a risk assessment process that is practical and sustainable. It will identify risk, measure it against a common set of criteria, assess potential impact of risk(s), and detect any potential interaction with other risks and/or processes it may have. Using the data gathered, risks will be prioritized and an appropriate response will be developed<sup>87</sup>. The overarching goal of the risk assessment is to ensure accurate financial statements and reporting, mitigate any risks, and to execute our fiduciary responsibilities with fidelity.

**2. 5-Year Pro-Forma Budget.** Please see **Attachment 15.**

**3. Budget Narrative.** Please see **Attachment 16.**

**4. Additional Requirement for Pre-Existing Non-Profit Organizations.** Not applicable.

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<sup>86</sup> <http://www.accountingtools.com/questions-and-answers/how-to-reconcile-the-general-ledger.html>.

<sup>87</sup> <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Governance-Risk-Compliance/dtl-grc-riskassessmentinpractice.pdf>.

Exhibit A

**Application Checklist**

#	Document	Page Limit	Format	Completed
	Proposal Overview	Use Template in <u>Exhibit B</u>	PDF	<input type="checkbox"/>
	Proposal (including Executive Summary)	50	MS Word or PDF	<input type="checkbox"/>
1	Applicant Group Resumes	None	MS Word or PDF	<input type="checkbox"/>
2	Board Member Information Form (completed by each proposed board member)	Use Template in <u>Exhibit C</u>	PDF	<input type="checkbox"/>
3	Decision-Making Authority	Use Template in <u>Exhibit D</u>	PDF	<input type="checkbox"/>
4	Course Scope and Sequence	30 pages	MS Word or PDF	<input type="checkbox"/>
5	Academic and Exit Standards	15 pages	MS Word or PDF	<input type="checkbox"/>
6	School Calendar and Schedule	10 pages	MS Word or PDF	<input type="checkbox"/>
7	Enrollment Policy	10 pages	MS Word or PDF	<input type="checkbox"/>
8	Student Discipline Policy	10 pages	MS Word or PDF	<input type="checkbox"/>
9	Evidence of Support from Community Partners	None	MS Word or PDF	<input type="checkbox"/>
10	Governance Documents	None	MS Word or PDF	<input type="checkbox"/>
11	Statement of Assurances (only one form required)	Use Template in <u>Exhibit E</u>	PDF	<input type="checkbox"/>
12	Organizational Chart	5 pages	MS Word or PDF	<input type="checkbox"/>
13	Start-Up Plan	10 pages	MS Word, Excel, or PDF	<input type="checkbox"/>
14	Insurance Coverage	None	MS Word or PDF	<input type="checkbox"/>
15	Budget and Staffing Workbook	Use required template	MS Excel (no PDF submissions)	<input type="checkbox"/>

#	Document	Page Limit	Format	Completed
16	Budget Narrative	5 pages	MS Word or PDF	<input type="checkbox"/>
17	Existing Non-Profit Entity Financials (if applicable)	None	MS Excel, Word, or PDF	<input type="checkbox"/>
18	Entire Application (excluding items exempt from Indiana's Public Access Laws <b>assuming prior written approval from Indiana's Public Access Counselor</b> )		PDF	<input type="checkbox"/>



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 1**

# **Applicant Group Resumes**

**ASIA A. BARTEE, PHR**  
**7150 ANDERSON DRIVE**  
**ZIONSVILLE, IN 46077**  
**(317) 361-5234**  
[asia.massey@gmail.com](mailto:asia.massey@gmail.com)

### **CAREER SUMMARY**

Over 10 years of progressive Human Resource Management & Nonprofit Management experience supporting multiple client groups and mid-level employees and management, leading efforts in Staffing/Workforce Planning, Program and Process Implementation/Improvement, Performance Management, Employee Relations, Event Planning, HRIS Reporting, HR Transformation, Organizational Development and overall HR Administration

### **EDUCATION**

**INDIANA WESLEYAN – MASTERS OF BUSINESS ADMINISTRATION** **INDIANAPOLIS, IN**

*Masters of Business Administration – Human Resources*

**INDIANA UNIVERSITY- KELLEY SCHOOL OF BUSINESS** **INDIANAPOLIS, IN**

*Bachelor of Science in Business*

**DOUBLE MAJOR:** Human Resource Management & Business Management **MINOR:** Psychology

### **WORK OPPORTUNITIES**

**Human Resources Manager, Johnson Controls** **September 2015 – Current**

- **Labor Relations** – Oversees the labor relation activities for the plant consisting of over 70 union members, posting/completing job bids, working with upper management on disciplinary actions,
- **Employee Relations** – Serves as lead HR partner leading all employee relations matters non-union employees including management team, leads disciplinary actions, performance management for managers, leads employee engagement for hourly division
- **Employee Engagement** – Carries out Global Employee Survey gathering employee feedback on leadership, plant and overall morale, works with leadership team to implement and establish site action plans, champions leadership development of staff by providing management training, assigning leadership development seminars, tracking progress with action plans, sponsors the employee engagement committee
- **Training/Learning Development** – Hosts HR Lunch & Learn training courses for leadership group, works with Quality Manager to create work instructions for work processes and facilities training, implemented training and development matrix for entire plant, works with Plant Manager on succession planning gaps and coordinates/provides proper training for staff, responsible for OD Change Management initiatives
- **Succession Planning** – Works directly with Plant Manager on identifying high critical roles, top talent, diversity and inclusion efforts, identifying development areas in staff and establishing SMART goals for improvement, networking/recruiting for competitive talent, cross training staff employees and transitioning hourly team leads into management supervisor roles

**Sr. HR Generalist, Amazon.com**

Nov. 2012 – Sept. 2015

- **Performance Management:** Lead weekly production rate review meetings for over 900 hourly associates with line and senior managers, lead employee investigations and recommended course action per offense
- **Training/Learning Development:** Created new hire presentation PowerPoints, facilitated change management sessions for leadership teams, worked with Learning Department to create training programs for new hires, and drafted new policies and procedures for HR standardization project
- **Staffing/Project Management:** Served as the point of contact for leading staffing initiatives for the IND2/IND5 node, streamlined applicant conversion process for temporary division, confirmed staffing labor plans, created recruiting plans for direct hires, conducted weekly recruiting hiring events as needed, facilitated orientation for over 60 new hires as needed, owned project decisions for the entire staffing process consisting of over 500 direct hire applicants and 200 conversion applicants at a time, worked alongside Finance and Sr. Operations Team
- **HR Metrics & HRIS:** Formatted attrition report, interpreted headcount report and daily roster scrubs to Senior Team, assigned labor planning codes to hourly division for labor hour tracking, performed weekly audits for labor planning for any planned new starts upcoming, streamlined compliance for I-9 processing, lead monthly HR Assessment for HR Compliance, Knowledgeable and served as point person to pull departmental reports out of the following software: PeopleSoft, Business Insight, Taleo, ICISMS, OnBase/MyDocs, and Salesforce
- **HR Administration:** Approved school tracking accommodations, administered and tracked certificate of fitness program, served as point person for internal transfers and promotions, conducted weekly Champion of Associate Engagement Interviews and HR Gembas
- **Benefits Administration:** Approved leaves of absences (Personal leave, Medical Leave/ Non-FMLA, Leave of Absence, and Military Leave) and worked with the Amazon Leave of Absence team to make sure we returned employees back to work properly, worked directly with Workers Comp Manager in resolving work-incidents, long-term accommodations, and transitional work analyses
- **HR Projects & Initiatives:** Led the paper conversion to electronic management for site which included training Area Managers and Senior Team on new processes, lead the IND Node on direct hire efforts and assisted with direct hire events, served on HR for Diversity Committee and conducted informational sessions with targeted populations, lead High School Recruiting Program for the entire region that consisted of over 50 FCs sending me reports for program evaluation, lead new initiative to integrate the entire NAFC site staffing teams to lead recruiting events for the employer
- **Employee & Labor Relations:** Handled over 50 employee investigations a month minor and major scaled, assessed ADA/Reasonable Accommodations, advised managers on FLSA regulations, administered feedback as necessary

**Human Resources Generalist Indianapolis Bakery- Kroger Manufacturing**

Oct. 2007 – Nov. 2012

- **Employee & Labor Relations:** Administered and communicated all human resource plans, procedures and protocol to 200 labor union associates and management, drove associate engagement through participation in company-wide committees and employee appreciation activities such as distributing birthday cards, service year awards, and safety milestone awards, and investigated, prepares, and processes labor union complaints and grievances
- **Compensation & Benefits Administration:** Responsible for accurate and pay progression for both production and maintenance union contracts, provided benefits/compensation consultation to all union hourly and management associates regarding health benefits, employer assistance programs, and retirement plans, resolved all compensation and benefits conflicts with participating third party vendors

# **MARY A. (MOLLY) CHAMBERLIN**

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8225 Ontario Lane  
Indianapolis, IN 46268  
(317) 435-7490

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## **EDUCATION**

Ph.D., Educational Psychology, September 2009  
M.S., Educational Psychology, December 2004  
Indiana University, Bloomington, IN  
B.A., Liberal Arts, *Magna Cum Laude*, May 1997  
Middlebury College, Middlebury, VT

## **WORK EXPERIENCE**

### **Vice President (Research, Evaluation, and Economic Development)**

Thomas P. Miller and Associates

October 2015 to present

- Oversee practice areas of research, evaluation, and economic development for mid-size, national consulting organization
- Provide strategic direction and planning for each practice area
- Design, lead, and provide quality oversight and analysis for project evaluations at the federal, state, and local levels
- Provide quality assurance, data analysis, and oversight for research projects
- Provide oversight for economic development projects

### **Director of Evaluation**

Indiana Youth Institute

June 2014 to October 2015

- Designed and conducted internal evaluation for programs that provide support and training to individuals working with children and youth
- Assisted program managers in the creation, review, and revision of program goals and strategic outcomes
- Analyzed and reported program data to support agency-wide strategic planning
- Designed evaluation plans for external organizations and provided oversight to external evaluation services

### **Chief Accountability and Assessment Officer**

Center for Education and Career Innovation

November 2013 to June 2014

- Provided strategic planning and vision for statewide accountability and student success measures
- Collaborated with relevant state agencies and stakeholders to review and improve existing assessment and measurement systems and support new and innovative ways to assess student learning
- Supported the implementation of various accountability plans across all levels of the education spectrum
- Coordinated planning and implementation of the statewide longitudinal data system, especially related to measures of student success at various levels of the education spectrum
- Built capacity of agencies and stakeholders to access, review, and analyze data for transparent and strategic decision making and program evaluation

### **Associate Commissioner for Research & Information**

Indiana Commission for Higher Education

July 2011 to November 2013

- Assisted in the creation of revised performance funding metrics for public institutions of higher

- education
- Worked with institutional research offices to identify and implement innovative ways of defining postsecondary institutional success
- Provided governance support and strategic planning across multiple state agencies for statewide longitudinal data system (IWIS)
- Provided support through data analysis and policy presentations for the Commission, a board of professionals appointed by the Governor
- Utilized data to inform postsecondary education policy and programmatic decision-making
- Coordinated various research projects designed to examine program effectiveness
- Oversaw statewide data collections from public institutions of higher education
- Oversaw implementation of data warehousing system and report creation

### **Chief Accountability Officer**

Indiana Department of Education, Indianapolis, IN

February 2009 to July 2011

- Managed team of professionals covering areas such as policy, evaluation, and information technology
- Oversaw statewide accountability initiatives for public and accredited non-public schools
- Developed and implemented strategic plan and objectives for Division initiatives related to data quality, evaluation, and data analysis
- Created dashboards for sharing information about public and accredited non-public schools
- Provided training to school districts on logic models and general evaluation techniques
- Oversaw, coordinated, and reviewed data analysis projects
- Oversaw and coordinated implementation of K-12 enterprise data warehouse system
- Coordinated Department-wide research and evaluation projects
- Collaborated with individuals within and outside of the Department to enhance efficacy in data usage for program evaluation

### **Director, Office of Student Learning Choices**

Indiana Department of Education, Indianapolis, IN

March 2004 to February 2009

- Managed four program areas, including Supplemental Educational Services (SES), Public Charter Schools Program (PCSP), Alternative Education, and McKinney-Vento Homeless
- Created first-ever accountability and evaluation systems for state alternative education programs
- Created and implemented evaluation system for Supplemental Educational Services providers
- Developed and implemented strategic planning for the Division
- Made, analyzed, and interpreted policy for all program areas and special projects
- Conducted data analysis and evaluations to promote effectiveness of all program areas
- Provided technical assistance to schools and districts on logic models, metrics-setting, and evaluation of effective practices
- Wrote grants for related federal programs (obtained over \$27 million in federal funds for the Public Charter Schools Program and Statewide Longitudinal Data Systems (SLDS) grant)

### **Research Associate**

Indiana Education Policy Center, Bloomington, IN

January 2003 to March 2014

- Co-created and assisted in conduction of first ever Public Opinion Survey of Education in Indiana
- Conducted evaluation of various comprehensive school reform programs
- Conducted and disseminated research and evaluation on K-12 policy issues
- Compiled policy briefs for publication on a variety of K-12 education issues

### **ESL Instructor, Assistant Trainer**

Berlitz Language Center, Indianapolis, IN

September 2000 to December 2002

- Designed training courses for new and current instructors
- Evaluated existing programming and assisted in creation of new programming
- Taught ESL courses to students of various ages and nationalities

**Life and Annuities Specialist**

Bisys Insurance Services, Inc., Indianapolis, IN

January 2000 to October 2000

- Provided quotes and product knowledge to life insurance and annuity agents

**Trainer/ESL Instructor**

Nova Intercultural Institute, Tokyo, Japan

September 1997 to December 1999

- Managed schools of over 20 people
- Conducted on-the-job training and follow-up training for new teachers throughout the Tokyo area
- Designed new system of follow-up training for teachers throughout the Tokyo area
- Evaluated effectiveness of teachers and conducted training accordingly
- Taught ESL courses to Japanese students of various ages and language abilities

**PUBLICATIONS**

Chamberlin, M. & Plucker, J. (2008). P-16 education: Where are we going? Where have we been? *Phi Delta Kappan* (89)7, March 2008.

Plucker, J., Chamberlin, M., Zapf, J., & Simmons, A. (2004). *2003 public opinion survey on education in Indiana*. Published by the Center for Evaluation and Education Policy, January 2004.

Chamberlin, M. & Eckes, S. (2003). Title IX and women's athletic opportunities in Indiana colleges and universities. *Education Policy Briefs*, (1)6, Winter 2003.

Chamberlin, M., Plucker, J., & Kearns, A. (2003). Highly qualified teachers in Indiana. *Education Policy Briefs*, 1(4), Winter 2003.

Plucker, J., Jones, M., & Chamberlin, M. (2003). ISTEPing in the right direction? An analysis of fall vs. spring testing. *Education Policy Briefs*, 1(3), Winter 2003.

Chamberlin, M. & Plucker, J. (2003). The four-day school week. *Education Policy Briefs*, 1(2), Winter 2003.

**HONORS AND RELEVANT SKILLS**

Bell Ringer Award, awarded by Indiana State Superintendent of Public Instruction, 2008

Berlitz Teacher of the Year, Akron District, 2001

Moderately proficient in German and Russian; beginner's knowledge of Japanese Proficient in SPSS and Microsoft Office

**Community Involvement:**

- *REP Facilitator/ Youth Mentor (Juvenile Justice Center) (2013-Present)*
- *Coordinator Indianapolis Kwanzaa Committee (2010 – Present)*
- *Poverty and Education Working Group (City of Indianapolis) (2017)*
- *Sonar Stud Club (Coordinator): Dental Study Club (2007 – Present)*
- *RED Subcommittee Group; Deep End Subcommittee Group (Juvenile Justice Center)*
- *Youth and Family Summit Program Committee (April 2015)*
- *The Exchange: National Urban League Young Professionals (Member)*
- *N'COBRA: National Coalition of Blacks for Reparations in America (Member)*
- *Royal Mentality (Coordinator): Bloom Project (mentor group) college and career program*
- *OpprotunIndy (Advisory Board): Indiana Black Expo/ My Brother's Keeper*
- *Public Art for Neighborhoods over site committee (Arts Council of Indianapolis)*
- *Civic Boot Camp 2016 (Leadership Indianapolis)*
- *CICF Community Ambassador (Aug 2017)*

**EXPERIENCE**

**Flanner House**

**August 2017 – Present**

*Director of Food Justice*

- Managing and maintaining the community farm and the sale of produce from the farm
- Maintaining the community garden
- Coordinating the F.E.E.D program (16 to 24-year-old program)
- Northwest Quality of Life Plan Food Access Co- Chair
- Managing and directing all volunteers for Flanner House

**Youth Advocate Programs: Marion County**

**October 2016 – July 2017**

*Director*

- Responsible for all services provided to clients and their families who are referred to the program
- Oversee the intake process including assessments of individuals referred and appropriate family members
- Manage a county program within budget parameters
- Manage a workload of 14 families
- Assist staff in creative problem solving, including securing needed professional resources for clients and their staff

**Indianapolis Neighborhood Resource Center (I.N.R.C)**

**October 2015 – October 2016**

*Neighborhood Development Specialist*

- Assist residents in identifying neighborhood assets and priorities using Asset Based Community Development
- Engage in neighborhood and citywide events for outreach and public relations.
- Identify common neighborhood trends; develop and implement programs to enhance community knowledge on issues that impact neighborhoods.
- Assist in creating partnerships between residents, neighborhood-based groups, faith-based organization, city/state government, health/ human service providers, CDCs, multi-service centers, job training, educational institutions, housing, local businesses and other community assets.
- Facilitate workshops on Asset Based Community Development (ABCD) and Asset Mapping

**EDUCATION**

**Bachelors of Science in Business Administration**

**May 2008**

Florida A & M University, Tallahassee, FL

## Daniel A. Levine

6206 Meridian St. West Dr. • Indianapolis, IN 46260 • C: (317) 501-8489 • E: [danlevine8489@gmail.com](mailto:danlevine8489@gmail.com)

Strategic, results driven and resourceful professional with extensive experience in supply chain systems, principles and theories, supplier management, procurement, finance and customer relationship management. Proven ability to identify, develop, implement and manage procurement and project management solutions. Collaborate and advise teams in managing top vendor relationships. Successful execution of operational plans and strategies of domestic and global programs delivered on time at or below budget.

- 7 Step Sourcing Process
- P&L responsibility
- RFx
- Managed Global business initiatives & teams
- Lean manufacturing / JIT Inventory practices
- Sustainability

### PROFESSIONAL EXPERIENCE

#### Manager, IT Vendor Management

2017- Present

HERFF JONES • Indianapolis, IN

- Responsible for new IT Services and product acquisitions.
- Work with business areas to identify and understand their needs for new acquisitions and run RFx projects to find suitable vendors and products
- Guide our business areas through the negotiation process to help ensure that we obtain the best terms and conditions in our contracts and best possible pricing.
- Develop standard policies and procedures related to our interactions with our current and future vendors.

#### Director of Procurement

2015- 2016

FINISHMASTER • Indianapolis, IN

- Managed indirect and direct Purchasing in excess of \$500m for 181 domestic retail paint stores.
- Successfully managed and implemented core initiatives to control cost of inventory and manage pricing through the development of a 3-year Strategic Plan.
- Transitioned existing suppliers to formal agreements, achieving greater than 55% compliance with key suppliers in the first 5-6 months. Responsible for meeting 12-18-month goal of 95% of COGS through key supply base.
- Managed processes for savings, achieving over \$500k and maximized year end rebates of 4-6%.
- Worked with supply base and both IT and AP to bring 50% of all suppliers under electronic invoicing.
- Utilized Financing Agreements with national bank to bring an additional \$5m in spend through vendor financing agreements, resulting in maximized cash flow through extending payment to 6 months.
- Established new Travel Portal, collaborating with IT to develop backend system support, projected savings of greater than \$250k through managed compliance and vendor negotiations.
- Managed fleet of 800 vehicles; negotiated competitive RFP for acquisition and ongoing safety and maintenance.

#### Director of Procurement

2012-2015

CROSSPOINT SOLUTIONS GROUP, A Division of Cummins Crosspoint • Indianapolis, IN

- Managed the Purchasing of both Indirect and Direct spend for the manufacturing of products utilized in the trucking industry.
- Cummins acquired two green initiative product lines from multiple bankrupt companies to create a single start-up company. As a result of acquisition, analyzed previous Build of Material (BOM) and component availability, created strategic sourcing plan, forecasted demand, and negotiated pricing and contracts. Initial product launch within 6 months of acquisition.
- Managed the purchasing process of real estate, capital equipment, direct materials, IT (hardware, software, and support) and subcontract/outsourced project management.
- Negotiated savings of overall BOM costs in first 12 months by more than 12% while improving turns to 8-10 per year through the creation of a repeatable, scalable, and sustainable model within 9 months of launch.
- Developed and implemented metrics to manage supplier service levels to ensure compliance with purchasing requirements and alignment with Cummins corporate goals, which exceeded Company expectations.
- Selected to lead and transition Intuitive ERP System which allowed Supply Chain, Production, and inventory to manage their respective business in one location.
- Implemented a JIT inventory and cost reduction process through alternative components introduction and model cost follow-up initiatives.

# Daniel A. Levine

6206 Meridian St. West Dr. • Indianapolis, IN 46260 • C: (317) 501-8489 • E: [danlevine8489@gmail.com](mailto:danlevine8489@gmail.com)

## Project Management, Supply Chain and Purchasing Consulting

2011-2012

PRIVATE CONSULTING • Indianapolis, IN

- Developed and implemented project plans for clients resulting in cost efficiencies. Documented processes for future use after engagement completion.
- Performed contract and spend analysis to identify savings opportunities and negotiate with suppliers on behalf of clients. Took over PM role to lead several stalled projects to completion resulting in a savings greater than \$600k over a 14-week timeframe and a reduction in spend with key suppliers by more than 17%.
- Analyzed, developed and recommended strategies to Senior Purchasing Management clients for project plans and specific operational goals, which resulted in streamlined internal processes and increased service levels.

## Strategic Sourcing Manager

2008-2011

WELLPOINT INC. • Indianapolis, IN

- Managed Indirect spends of \$60-70m in HR, IT Software, Recruiting, Training, Memberships, Relocation, Social Responsibility, WellPoint Foundation, and Actuarial through Sourcing, Contract Negotiations, and Financial Management.
- Reduced annual spend through negotiations and systematic approach in the following areas: Human Capital 5%, Taleo Talent Management 25%, E-Learning 20%, Fitness Centers 19.7%, Affirmative Action 50.1%, Service Awards 87%, Training 43.4%, through contract negotiations, market intelligence, opportunity identification, and cost analysis (Strategic Sourcing Methodology) resulting in >\$4M annually.
- Partnered with business owners to increase diverse supply base, improving usage to 9% annually.
- Responsible for assisting with technology rollout and implementation: Ariba, P-Card usage to \$50M, and eRFx to \$150M.
- Conducted an RFP with 6-7 software suppliers to support Sales Training. Identified who reflected the initiatives, pricing, and timeline for delivery and worked to perform rollout within current Learn Management System (LMS)

## Global Commodity Manager

2003-2008

THOMSON INC. • Indianapolis, IN

1999-2008

Responsible for Manufactured and Outsourced RCA branded Televisions and the coordination of Non-Productive & Indirect Purchasing spend in excess of \$75m.

- Developed and managed strategic sourcing programs to track spend, marketplace, strategy, supply base, bid process, negotiations, rollout and tracking of results and supplier performance, utilizing cross-functional team management, best-class sourcing methodologies, strong financial and process analytics, benchmarking, market research, and strategy development using Total Cost Ownership (TCO) analysis, which resulted in exceeding 6% annual savings goals.
- Directed and implemented competitive benchmarking. As a project leader of supported core teams, ensured full model cost follow-up responsibility on financial implications of team decisions. Delivered results in professional presentation to senior management resulting in approval to complete projects.
- Accountable for managing annual global budget of \$70-100M within HR Services and Maintenance, Repair, and Operations (MRO) achieving annual savings goals of 6% year over year, while increasing payment terms from >30 days to an average of 57 days.
- Negotiated long-term supply agreements; which met or exceeded price reduction and performance goals with new and existing suppliers including: supplier resources, new technology, and aggressive negotiations resulting in a win/win relationship with supply base.

## Strategic Sourcing Manager

1999-2003

- Led Project Management in collaborative environment leveraging entire procurement process from RFP through Managed Acquisition Process utilizing 7 Step Sourcing Process. Partnered with internal customers, developed and implemented a measurable 6/12-month strategy maintaining team and individual accountability in the achievement of corporate goals.

## EDUCATION

- B.S., HUMAN RESOURCE MANAGEMENT, Palm Beach Atlantic University, West Palm Beach, FL
- CERTIFIED PROFESSIONAL SUPPLY MANAGEMENT (CPSM), expected 2017

## PROFESSIONAL AFFILIATIONS

- IAIC, Board of Directors
- ISM - Central Indiana, Current Member, former Board Member

# ROBERT MARSHALL

7160 Camwell Drive, Indianapolis, IN 46268  
rmarshall@buildingexcellentschools.org - (317) 513-2128

Accomplished leadership professional with significant experience in creating and successfully implementing community outreach and social responsibility strategies for non-profit and corporate entities. Ability to build relationships with key internal and external decision-makers while managing numerous, simultaneous projects resulting in organization revenue and opportunity growth. Excellent management, administration and fund-raising skills with measurable results in achieving a positive impact on an organization's mission and its members.

## PROFESSIONAL EXPERIENCE

### **BUILDING EXCELLENT SCHOOLS**

August 2016-Present

#### **Fellow**

- Participated 100 training days throughout the year, across the country and in Boston, focused on Instructional Design and Leadership, School Culture, Strategic Management, Financial Management, Governance, and Community Engagement.
- Completed two month-long residencies in a successful urban charter school under the supervision of an experienced school leader
- Received coaching and support for board and charter application development
- Analyzed best practices of more than 40 of the highest performing charter schools across the country

### **CENTER FOR LEADERSHIP DEVELOPMENT**

August 2014 - August 2016

#### **Senior Director of Programs**

- Lead programs team (four departments) in achieving maximum program participation, efficient coordination and the effective delivery, measurement and reporting of outcomes.
- Responsible for large portion of an annual operating budget of \$1.8 million and management of 20 staff members.
- Provides support and assistance in grant writing and reporting.
- Establishes core learning objectives for each program and insures that curricula, materials and facilitators achieve desired results and meet or exceed participant expectations.
- Prepares reports and updates for internal use and external constituencies, including the CLD board, funders, grantors, and other key stakeholders.
- Oversees and strengthens program administrative processes, programmatic impact, and operating procedures for optimum efficiency and achievement of strategic goals and benchmarks.
- Employs strong database knowledge and skills in efficient, timely use of CLD's database to record, retrieve and analyze data measuring program quality and impact.

#### **Key Accomplishments:**

- In 2014 (August - December), led a 240% increase in service touches delivered
- Surpassed unduplicated number of participants served in all of 2014 by September of 2015.
- In 2015, assisted in developing, writing, implementing and evaluating grant proposals totaling \$414,000 and an organization record year of revenue
- Lead the development of an African-American Male Initiative focused on providing further enrichment to adolescent African-American males already in CLD programs and in the six (6) Indy "Hot Spots"
- Established a CLD Ambassador program by which young people could give back to CLD through service, representing it at community outreach opportunities and recruiting families to participate
- Organizational record number of service touches delivered in 2015

### **BOYS & GIRLS CLUBS OF INDIANAPOLIS**

June 2011 - 2014

#### **Lilly Unit Director**

- Manage organization operations and hire and develop staff.
- Responsible for annual operating budget of \$316K and 20 staff.
- Develop and implement programs designed to educate and inspire youth through learning and recreational activities.
- Plan and coordinate special events, community outreach programs, and fundraising opportunities.
- Persuade parent involvement in children's and fundraising activities.
- Oversee all Unit, Advisory Board, and individual grant budgets (35+ in 2012), expenditures, and credits.

#### **Key Accomplishments:**

- Exceeded fundraising goal by more than 200% in 2012 and reached 2013 goal by the end of the first quarter including but not limited to the cultivation of a corporate partnership resulting in securing over \$19K to purchase a 14-passenger bus and new computers.
- Served on the Human Resources, Hiring Practices, and Unit Director Training Sub-committees

- During the 2012-2013 school year, increased average daily attendance by 41%, total visits to the Club by 43%, and participation in academic enrichment programs by 344% (highlighted in “8 Ways to Boost Your ADA” in the Winter 2013 issue of Boys & Girls Clubs of America’s Connections publication).
- Achieved numerous grants utilized for various program enhancements including music and recreational equipment such as the successful volunteer-funded renovation of four rooms within the Lilly Club valued at \$20K
- Achieved partnership with United Way of Central Indiana to become the first non-school site for its ReadUP program.
- Restructured the Club’s Board including the addition of parent and youth members, new officers, and governing guidelines.
- Produced/Marketed/Hosted three successful special events, each achieving Club record numbers of attendees; i.e., 500+ attendees for two events in 2013 (Halloween and Christmas events)

**100 BLACK MEN OF INDIANAPOLIS**

December 2008 - June 2011

**Director, Team Mentoring**

2008-2011

**Interim Director, Programs**

2010-2011

- Managed all program-related contracts and partnerships with outside organizations.
- Administered the organization’s largest grant and funding agreement, \$275K, and developed the subsequent funding agreements.
- Developed and implemented program-related special events, including competitions and awards programs.
- Managed program budgets and expenditures by creating and analyzing monthly, quarterly, and annual reports for programs; implemented cost control and revenue increase strategies resulting in \$30K in savings plus \$30K in increased income.
- Supported the Board of Directors by providing monthly program dashboard reports, assisted with Board restructuring, and cultivated major donor and fundraising efforts including the 25th Anniversary Gala which netted over \$90K.

**Key Accomplishment:**

- Awarded the 2009 Indianapolis Professional Youth Empowerment Honor for outstanding mentoring program.

**CITY OF INDIANAPOLIS**

January 2006 – November 2008

**Douglass Park Manager**

- Designed/implemented recreational programs and developed staff service in sports and fitness, the arts, youth and family programs, seniors and special needs.
- Projected/monitored/adjusted park and Advisory Council budgets, expenditures, revenue, contracts, and partnerships
- Coordinated and facilitated a volunteer Park Advisory Council
- Managed customer service relations at the park location including all forms of communication and marketing of programs/services.

**Key Accomplishments:**

- Wrote and received grants for computer lab, special events and to support programs valued at more than \$30K
- Established partnerships and strategic alliances that brought in over \$15K.

**EDUCATION**

**B.A. Political Science/Pre-Law**, Morehouse College, Atlanta, Georgia

2005

**B.A. Organizational Leadership**, University of Indianapolis, Indianapolis, Indiana

2018 Candidate

**PROFESSIONAL DEVELOPMENT**

**Child and Youth Care Professional**, University of Texas

2017

**Principles & Techniques of Fundraising**, IU Lilly Family School of Philanthropy

2014

**Advanced Leadership Program**, Boys & Girls Clubs of America

2011

**List of Trainings for the 2016-2017 Building Excellent School Fellowship**

<b>Date</b>	<b>Training</b>	<b>Duration</b>
8.24.16	School Vision	1.5 hours
8.25.16	Adult and Student Culture	1 hour
8.26.16	School Mission and Vision	5 hours
8.29.16	School Vision	1 hour
8.29.16	Charter History	.75 hour
8.29.16	Charter Law	1 hour
8.29.16	501c3	1 hour
8.30.16	Book Study: Shakleton's Way	1 hour
8.31.16	Governance	2 hours
9.1.16	High Performing Schools	1.5 hours
9.2.16	Governance	2 hours
9.3.16	Community Need	1.25 hours
9.3.16	Enrollment	1.25 hours
9.3.16	Educational Philosophy	2 hours
9.7.16	Marketing	1 hour
9.8.16	Facilities	3 hours
9.8.16	Governance	1 hour
9.9.16	Education Program	3 hours
10.1.16	Math Rigor Workshop	6 hours
10.3.16	School Culture	1.75 hours
10.3.16	Staff Culture	2 hours
10.3.16	Annual Calendar	2 hours
10.4.16	Breaking Down Standards	1.75 hours
10.4.16	Curriculum	1.75 hours
10.4.16	Instruction	2 hours
10.5.16	Assessments	2 hours
10.5.16	Data	1 hour
10.5.16	Family Involvement	1 hour
10.5.16	Dashboards	1 hour

10.5.16	Special Education	2.75 hours
10.6.16	ELL and Other Sub-Groups	1.75 hours
10.6.16	Governance	4 hours
10.6.16	Organizational Charts	1.5 hours
10.7.16	Leadership Voice	1.75 hours
10.7.16	Accountability	2 hours
10.7.16	Daily Schedule	1.5 hours
10.8.16	Budget Building	5 hours
10.10.16	Professional Development	1.75 hours
10.10.16	Teacher Feedback	2 hours
10.10.16	Staff Evaluation	1.5 hours
10.12.16	Student Discipline	3 hours
10.13.16	Technology & Innovation	1.5 hours
10.14.16	Book Study: Coach Wooden's Greatest Secret	1.75 hours
10.14.16	Job Descriptions	2 hours
11.7.16	Budget	1.5 hours
11.9.16	Operations	1.75 hours
11.9.16	Book Study: Good to Great/Great by Choice	2 hours
11.9.16	Budget	.75 hour
11.10.16	Budget	8.5 hours
11.11.16	Budget	8.5 hours
11.12.16	Blended Learning	3 hours
11.14.16	Governance	6 hours
11.14.16	Governance	6 hours
11.16.16	Facilities	6 hours
11.16.16	Fund Development	2 hours
11.16.16	Back Office Providers	2 hours
11.17.19	Vendor and Contract Management	1 hour
11.17.16	Transportation	1 hour
11.17.16	Health and Nutrition/Student Information System	1.5 hours
11.17.16	Insurance and D&O Insurance	1 hour
11.19.16	ELA Instruction - Rigor	6 hours
12.10.16	ELA Instruction - Rigor	4 hours

12.10.16	Hiring	1.5 hours
12.12.16	Governance	2 hours
12.13.16	Leadership Voice	1 hour
12.13.16	Book Study: Practice Perfect	1 hour
12.14.16	Attendance, Uniforms, and Supplies	1.5 hours
12.14.16	Grading, Promotion, Retention	1.25 hours
12.14.16	Family Contracts, Surveys, Info Sessions	2 hours
12.14.16	Human Resources	1 hour
12.14.16	Governance	1 hour
12.15.16	Community Support	8 hours
3.13-17.17	Teach Like A Champion	4.5 hours
3.13.17	Standards Breakdown ELA	7 hours
3.14.17	Standards Breakdown Math	4 hours
3.15.17	Scope and Sequence	7 hours
3.16.17	Governance	3 hours
3.16.17	Scope and Sequence	3.75 hours
3.16.17	Interim Assessments	2 hours
3.17.17	Founding Leadership	3.75 hours
3.17.17	Analyze Assessment Data	2.5 hours
3.18.17	Building Math Curriculum	6 hours
3.20.17	Data Action Planning	5 hours
3.20-24.17	Taxonomy Practice	3.75 hours
3.21.17	Leadership Voice	6 hours
3.22.17	Unit Plan Analysis/Planning	5.5 hours
3.23.17	The Together Leader	7 hours
3.24.17	Daily Materials and Intellectual prep	2.25 hours
3.24.17	Curricular Planning and Feedback System	1.5 hours
4.18.17	Daily Systems	4 hours
4.18.17	Communicating Daily Systems	2 hours
4.19.17	Governance	3 hours
4.19.17	Daily Systems	2 hours
4.20.17	School Culture: Rewards and Consequences	6.5 hours
4.20.17	Enrollment	2 hours

4.21.17	Student Supports: SPED and ELL	6 hours
4.22.17	Professional Development	5 hours
4.22.17	Home Visits	1 hour
5.9.17	Book Study: Leading with Honor	2 hours
5.10.17	Teacher Development/Feedback	9 hours
5.11.17	Live Coaching	6.5 hours
5.10-12.17	Taxonomy Practice	2 hours
5.12.17	Staff Expectations	2.75 hours
5.12.17	Difficult Conversations	2.25 hours
5.12.17	Staff Culture	2 hours
5.13.17	Job Descriptions and Role Mapping	5 hours
5.14.17	Maximizing Planning Year	2 hours
5.14.17	Building Talent Strategy	2 hours
5.14-18.17	Taxonomy Practice	3 hours
5.16-17.17	Leadership Presence	11 hours
5.18.17	Marketing	2 hours
	<b>Total Hours of School Leadership Training</b>	<b>326.5 hours</b>

## FOS Mission and Vision

### Mission

FOS challenges and supports each founder from the planning year through second year of operation to effectively deliver on the school's mission and vision and achieve its ambitious goals in closing the achievement gap.

**Guiding Principle #1: Our Strong Relationships Drive Transformational Growth**  
Breakthrough leadership learning can only happen when the DLD gains the leader's trust and establishes a strong relationship. The leader has to know that we will be both their biggest supporter and advocate and their toughest critic.

**Guiding Principle #2: We Constantly Push for a High Bar**  
We hold the bar high, especially when the leader is tempted to lower it. When the leader does not have a clear bar for excellence, we help them define it.

**Guiding Principle #3: We are Honest**  
We are direct, honest, and true. We say what the leader needs to hear, in away that she/he will hear it.

**Guiding Principle #4: We Target the Most Important Issues and Skills Founders Need to Tackle**  
We help founders prioritize the 1-3 most important issues facing them and develop the skill(s) they need to solve these issues.



## Follow-On Support Explained

### What is Follow-On Support?

- **Leadership coaching** for the three years after the Fellowship ends: planning year, year one of the school, year two of the school
- **Continuance of training and guidance** to prepare Fellow to effectively open and run a high performing, urban charter school
- **A mix of coaching activities:** visits to your school, weekly coaching calls, webinars, document review, and video feedback

### Why Follow-On Support?

BES believes that strong coaching of high capacity leaders is the most effective way to ensure high quality schools in urban communities across the country. Therefore, the mission of Follow-On Support at BES is to **challenge** and **support** each founder from the planning year through the second year of operation to effectively deliver on the school's mission and vision and achieve its ambitious goals.

### What Exactly Does FOS Look Like?

The following pages describe the coaching services provided by Follow-On Support by year, as well as the scope and sequence of leadership goals for each year.

### Is FOS Cost Effective for My School?

Yes. The chart below shows the savings to a BES school that uses FOS coaching.

Service	Market Unit Rate <sup>1</sup>	Total FOS Units	Total Market Cost
Individual Coaching	\$160 per hour	50 hours (approximate)	\$8000
Webinars/Resources	\$150 per session/resources	10 (approximate)	\$1500
Board Committee Action Planning	\$3000 per day	1 day	\$3000
School/Local Visits	\$3000 per day	3 days	\$9000
Travel Costs	\$500 per visit (approx.)	3 visits	\$1500
TOTAL MARKET COSTS			\$22,000
TOTAL FELLOW COSTS			\$10,000

<sup>1</sup> Market unit rates based on BES analysis, including price quotes from coaching services procured by nationally recognized CMOs.



## Planning Year

*In the planning year, FOS exists to push founders to become strong project managers, develop leadership skills where they have gaps, learn the content they need, hire their founding team, recruit their founding students, move from lead founder to executive, and crystallize the vision for the school.*

Standard Services	Cost	Additional Services	Cost
<p>FOS for founders consists of a minimum of 6 hours per month of support, broken up into:</p> <ul style="list-style-type: none"> <li>• Two, two-hour webinars.</li> <li>• Bi-weekly one hour check-ins with BES coach (or weekly 30 min check-ins)</li> </ul> <p>FOS for founders also includes one in-person visit per year.</p>	\$10,000 per year	<p>FOS may also include:</p> <ul style="list-style-type: none"> <li>• Document review.</li> <li>• TORSH video review of founder at a school site in teaching/leading role to build leadership presence.</li> <li>• School visits with coach.</li> <li>• In-person meeting to build the relationship.</li> <li>• In-person co-planning with coach.</li> <li>• In-person role playing and practice with coach.</li> </ul>	<p>No additional cost for document or TORSH review.</p> <p>School does pay cost of additional in-person support (above and beyond the 1 in the contract) if there is travel involved. Cost would incorporate any car mileage, airfare, hotel, and meals.</p> <p>Estimated cost for a two day trip (may vary depending on distance): \$700.</p>
<b>Webinar Topics</b>	Personal Organization & Project Planning for a Successful Year Zero; Teacher Recruitment; Effective Interviewing; Budget Refinement; Student Recruitment and Family Onboarding; Academic Goals, Data Systems,		



## Y0 Quarterly Leadership Development Goals

### Quarter 1: Sept-Nov

1. Leader establishes self as skilled project manager to drive multiple priorities simultaneously.
2. Leader immerses in residency to aggressively build needed skillset by getting frequent feedback from BES coach.
3. Leader recruits top talent by using a diverse array of strategies.

### Quarter 2: Dec-Feb

1. Leader effectively hires talent that is a strong culture and instructional fit for school.
2. Leader effectively recruits students to ensure healthy budget.
3. Leader sets academic and culture goals for the year (with metrics).

### Quarter 3: Feb-Apr

1. Leader articulates clear vision & rationale for every second of day and documents all systems for vision in handbook.
2. Leader sets expectations for staff w/rationale to ensure strong instruction & adult culture and memorializes in handbook.
3. Leader finalizes summer PD that prepares every teacher to lead high expectation classroom on day 1 of school.

### Quarter 4: May - June

1. Leader is ready to execute PD at a high level by rehearsing sessions with BES coach.
2. Leader plans every second of student orientation and prepares team to execute at a high level.
3. Facility is set up to support strong culture systems that support academic goals.

\* Note: Quarterly goals for leaders are continuous in nature. For example, recruiting top talent is a skill that is developed in Q1, but is still exercised throughout the year.



## Year One

*In year one, FOS exists to push leaders to champion and uphold their vision, become strong teacher coaches, use data to aggressively move academic results, manage and cultivate talent, and create personal organization systems that allow them to effectively deliver on their core responsibilities.*

Standard Services	Cost	Additional Services	Cost
<p>FOS consists of a minimum of 4 hours per month of support, broken up into:</p> <ul style="list-style-type: none"> <li>• Phone calls</li> <li>• Document review</li> <li>• TORSH video review</li> </ul> <p>Additionally, FOS provides four annual visits to campus:</p> <ul style="list-style-type: none"> <li>• Each visit lasts at least 3 hours</li> <li>• At least one visit takes places during summer PD or first days of school to ensure strong opening</li> <li>• Includes school walkthrough, school systems audit, and full debrief with written follow-up.</li> </ul>	\$10,000 per year.	<p>FOS may also be used for:</p> <ul style="list-style-type: none"> <li>• Visits to other schools with coach.</li> <li>• Additional visit to campus during a time of high need.</li> <li>• One week intensive culture reset if behavior is impeding learning.</li> <li>• Two week intensive if school has become an unsafe or non-respectful environment.</li> </ul>	<p>School pays cost of additional in-person support (above and beyond the 4 in the contract) if there is travel involved. Cost would incorporate any car mileage, airfare, hotel, and meals.</p> <p>Estimated cost for an additional visit to campus (may vary depending on distance): \$700.</p> <p>Estimated cost for a one week school reset: \$2500</p> <p>Estimated cost for a two week school reset: \$5000</p>

## Y1 Quarterly Leadership Outcomes

### Quarter 1: July-September

1. Leader plans & leads strong summer PD to establish academic and culture base (incl. "Day in the Life").
2. Leaders effectively coaches teachers on strong classroom culture.
3. Leader explains, models, and reinforces the "bar" for every stakeholder in every part of the school.

### Quarter 2: October - December

1. Leader diagnoses instructional trends and creates a data based action plan to move academic results.
2. Leader has a means of keeping "ear to the ground" re: staff culture and can invest/hold the line with adults.
3. Leader effectively recruits talent for Y2 using school as marketing tool.

### Quarter 3: January – March

1. Leader adjusts/resets weak systems for strong start to the new year.
2. Leader assesses effectiveness of curriculum and plans curriculum systems for Y2..
3. Leader start readiness process for following year re: hiring, facilities, enrollment, systems, budget, calendar for Y2, etc.

### Quarter 4: April - June

1. Leader effectively manages talent by non-renewing weak staff, developing Y2 leaders, and aggressively recruits for remaining vacancies.
2. Leader reflects on performance of school and sets goals for next year.
3. Leader plans summer work time to ensure strong Y2 (self, LT, ops).



## Year Two

*In year two, FOS exists to push leaders to champion their vision as the school doubles, sharpen the academic focus, manage talent in a competitive market, develop talent for future school growth, manage their role to empower others, and prepare the school to qualify for The Network.*

Standard Services	Cost	Additional Services	Cost
<p>FOS consists of a minimum of 4 hours per month of support, broken up into:</p> <ul style="list-style-type: none"> <li>• Phone calls</li> <li>• Document review</li> <li>• TORSH video review</li> </ul> <p>Additionally, FOS provides three annual visits to campus with the option of a fourth visit (if determined to be necessary by leader and/or coach):</p> <ul style="list-style-type: none"> <li>• Each visit lasts at least 3 hours</li> <li>• Includes school walkthrough, school systems audit, and full debrief with written follow-up.</li> </ul>	<p>\$10,000 per year.</p>	<p>FOS may also be used for:</p> <ul style="list-style-type: none"> <li>• Visits to other schools with coach.</li> <li>• Additional visit to campus during a time of high need.</li> <li>• One week intensive culture reset if behavior is impeding learning.</li> <li>• Two week intensive if school has become unsafe.</li> </ul>	<p>School pays cost of additional in-person support (above and beyond the 4 in the contract) if there is travel involved. Cost would incorporate any car mileage, airfare, hotel, and meals.</p> <p>Estimated cost for an additional visit to campus (may vary depending on distance): \$700.</p> <p>Estimated cost for a one week school reset: \$2500</p> <p>Estimated cost for a two week school reset: \$5000</p>

## Y2 Quarterly Leadership Outcomes

### Quarter 1: July-Sept

1. Leader develops 1-2 team members to take significant ownership in school and are able to execute on leader's vision.
2. Leader plans & executes high quality summer PD and onboarding.
3. Leaders effectively coach teachers, ensuring they are holding a high bar for culture

### Quarter 2: October - December

1. Leader uses systems for distributed leadership to ensure all leaders are implementing vision of school.
2. Leader effectively coaches (or coaches another leader to coach) teachers ensuring they are holding a high bar for academic rigor
3. Leader diagnoses instructional trends and create a data based action plan to move academic results.

### Quarter 3: January - March

1. Leader creates clear vision for grade level and dept. structures for Y3 and develops leaders to ownership of these structures.
2. Leader start readiness process for following year re: hiring, facilities, enrollment, systems, budget, calendar for Y3, etc.
3. Leader has short and long term facilities plans in place.

### Quarter 4: April - June

1. Leader effectively manages talent by non-renewing weak staff, developing Y3 leaders, and aggressively recruits for remaining vacancies.
2. Leader reflects on overall performance of the school and sets goals for next year.
3. Leader plans summer work time to ensure strong Y3 time (self, LT ops)

# Damon A. Martin. MBA, CSSGB

Indianapolis, IN 46260

(317) 258-9107

## BUSINESS INTERGRATION & PROCESS IMPROVEMENT PROFESSIONAL

### Transforming Culture, Building Enterprise Infrastructure and Engaging Associates Proactively

Results-driven leader with a solid background in financial operations, business integration and process improvement. Versed in rapid change deployment (Kotter, DMAIC, PDSA Cycle and Model for Improvement). Major Project Management (Agile, Waterfall). Connecting experience in complex enterprise systems, processes and people management; to collaborate in deployment of simple smart solutions, enterprise strategies, change management, technology support, metrics, talent acquisition, human capital improvements, cost mitigation and risk avoidance.

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## Work Experience

OneAmerica | Indianapolis, IN |

May 2013- July 2017

\$75B Assets Financial Services. Life Financial Services, Employee Benefits & Retirement Services

### Director of Talent Management Strategy/ Talent Acquisition

Responsible for linking to the enterprise business plan, enabling the enterprise capability to attract the quantity and quality of people to meet current and future business priorities.

- **Enterprise Talent Management Strategy:** Created enterprise strategy to improve the organization capability to attract the quantity and quality of in-demand talent for OneAmerica.
- **Developed Transparency and Governance Structure:** Developed and implemented transparent SOP's, organizational SLA, aligning processes and procedures which are transparent to all leadership and associates resulting in organizational governance, transparency, process guides, and accountability.
- **Implemented Scorecards/KPIs:** Primary aim is to provide clarity and transparency resulting in improvements in productivity, accountability and response times.
- **Supporting System –Enterprise Strategy:** Delivering excellence while creating 'Ease of Use' easy to do businesses with. Through VOB/VOC identifying "gaps" in training, supporting documentation, and system redundancy. Results: Removed the identified 'gaps' to create a consistent, standardized and commonly accepted requisition hiring practices to OneAmerica hiring management. Metrics: Cycle time from 12 days to under 5 days to post. 50 avg. days 2013 time to fill to avg. 38 days (excluding sales) 2015
  - **Responsible for implementing LinkedIn Strategy:** Grew 2k followers to over 7k. Reduced agency spend by \$200k in 12 months.
  - **Implemented Skype Interview Process:** Resulting in reduction of travel expense by 40%.
  - **Implemented DocuSign Process:** Automated several manual processes (i.e.- 3-day offer process reduced to hours).
- **Piloted Build vs. Buy Strategy:** Implemented innovative strategy to solve enterprise competency/capability (developed staffing model to solve hiring/retention issues and cost savings/mitigation 40%. Reached 100% goal attainment, improving operational metrics (reduction in call times/quality of customer interaction).
- **Overall budget reduction by 30%:** Attributed to improvement in tools, processes, and technology. Inclusive of reduction in agency, travel and advertisement expense.
- **Enterprise Diversity and Inclusion lead:** As a catalyst, approached the conversation with thoughtful interactions, developed steps, and implementation plan toward the journey of inclusiveness, through gaining agreement/engagement from senior leadership. Created diversity and inclusion steering committee, enterprise strategy focusing at five core pillars, with the outcome goal to deliver improvements to ROI, cultural engagement, and sustainability.

IU Health (Clarian Health Partners) | Indianapolis, IN |

Aug 2004- March 2013

Statewide multi-facility hospital and physician practice organization. \$7B Annual Billing Revenues.

### Director of Affiliate Operations

2009- 2013

- Served as business partner and lead project manager for new Physician/Hospital leadership team (CEO, COO,

and CFO); for the Revenue Capture Operations. Primary focus was to improve revenue capture, while reducing cost to collect, and write-off avoidance.

- Developed strategies, key KPIs/ business metrics and other operational data points to determine revenue capture, aging, denials, and other key measures to improve opportunities and operational improvements.
- Served as project manager and co-lead for a large scale integration initiative converting a major 600-bed hospital with gross revenue exceeding \$1.5B. Seamlessly integrated all 20 hospital based physician offices, managing 50+ associates in IT and Operations. Operating in both waterfall and agile environments.
- Led conversion of a 50 practice large Oncology group, with 200+ associates seamlessly to a hospital based billing platform. This was accomplished through development of standardized templates, process and practices. Integration conversion time, reduced to 90 days from 6 months.
- Through analyzing big data, achieved 50% reduction in business processes errors, resulting in eliminating costs to the system by 25% or -\$9M.
- Led multiple, major facility and physician practice process improvement projects with improvement to top line +33.3% to annual revenues, while maintaining cost to collect budget at or less than 2%.
- Reduced accounts receivable write-offs -55.4% bottom line through front end process improvements, examining key operational indicators, monitoring KPIs and implementing denial avoidance strategies.

#### **Managing Director, Enterprise Operations**

2005-2009

- Managed physician billing and liaison team focusing on revenue capture, process improvements, A/R billing efficiency and denial management. Improved billing errors by +20% and revenue capture by +\$3M.
- Implemented an enterprise staff and organizational development, training and change management strategy, aimed at new company integration, new hires, and training existing associates.
- Led the implementation of the 'Baldrige' plan and process improvement initiative that yielded a direct annual cost savings of \$1M to the operating expense budget through reduction in augmented staffing utilization and vendor expense.
- Measured outcomes for several human capital management initiatives one year post-implementation, reducing turnover rate by 5%, instituting a Strategic Succession Plan for key mission critical roles, achieving a 10 point increase in Workforce Engagement Survey (Gallup) and reducing onboarding time from 10 to 3 days by improving curriculum design and delivery.

#### **Sr. Human Resource Consultant**

2004-2005

- As HR Consultant for Clarian Health, and project lead for an acquisition/integration of a large physician billing group that seamlessly transitioned 125+ staff on time, under budget, within required parameters and aligned skills with the correct job fit.
- As Human Resources Consultant, developed and initiated the "Career Bridge Program" for a department that reduced staff costs and patient wait times, improved patient satisfaction and employee retention. Resulting in saving +/- \$1M in labor costs, while reducing wait time by 20% and increasing retention rate by 50%.

#### **PRIOR WORK EXPERIENCE 1991-2004**

Management Resource Solutions (Senior Recruiter / Principal), Management Recruiters (Executive Recruiter), KeyBank (Branch Manager), HBC Financial (Branch Leader), Golden Rule (Financial Agent Recruiter) Charles Schwab (Sr. Stock Broker). Held Series 7, 63 and Life and Health Licenses.

#### **EDUCATION / CONTINUING EDUCATION**

**Master of Business Administration**, Indiana Wesleyan University, Indianapolis, IN

**Bachelor of Science**, Communications; Minor: Economics; Indiana University-Indianapolis, IN.

**Six Sigma Green Belt Certification-CSSGB**. OneAmerica Leadership Development Program- 2015.

#### **AFFILIATIONS**

Member: SHRM, HBC Board-Council Member (Hispanic Business Council-Chamber of Commerce entity) Employ Indy Board Member Officer –Secretary & Finance committee 2015-2017 term. 100 Black Men. Past member: HFMA, Indiana Chamber of Commerce; Vice President – Circle City Frontiers Organization (community service organization).

# Juan Pablo Román-Lagunas

Román-Lagunas & Wheeler, LLC • 151 N. Delaware Street, Suite 140, Indianapolis, IN  
46204 [jprl@romanwheeler.com](mailto:jprl@romanwheeler.com) • 317-300-4577

## PROFESSIONAL EXPERIENCE

### Román-Lagunas & Wheeler, LLC,

*Partner,*

Indianapolis, IN

January 2013 – Present

**Criminal Law:** Extensive criminal defense experience in all aspects of felony and misdemeanor litigation; Extensive Jury Trial experience; Contractor, Marion County Public Defender Agency, Marion County Superior Courts, Criminal Division, G20 and G21 (January, 2013- Present).

**Civil Law:** Experience in Divorce; Custody Disputes; Protective Orders; Business Litigation; Contract Disputes; Landlord-Tenant Law; Small Claims; Federal Litigation; Professional Licensing; School Administrative Law; Civil Jury Trials; Civil Bench Trials.

### Marion County Public Defender Agency,

*Contract Attorney, Marion Superior Court, G20 & G21,  
Deputy Public Defender,*

Indianapolis, IN

January 2013 – Present

August 2009 – January 2013

## ADDITIONAL INFORMATION

**Language Skills:** Spanish: Native written and oral fluency.  
Greek: Conversational.

**Lectures / Seminars:** Indiana State Police Academy, Annual Lecturer to Academy, *Legal Procedure from the Perspective of the Defense*, 2010 – Present; Panelist, ABA Minority Trial Lawyer Committee, *Going Solo, How To Start Your Own Successful Practice* (2016).

**Bar Admissions:** State of Indiana (Admitted 2010); U.S. District Court Northern and Southern

Districts of Indiana (Admitted 2010).

**Professional Memberships:** American Bar Association; Indianapolis Bar Association; Saint Thomas More

Legal Society.

**Volunteerism:** 75+ hours of pro-bono work annually; Annual Judge, Indiana University, Maurer School of Law Moot Court Competition; Parishioner, Immaculate Heart of Mary.

## EDUCATION

### **Valparaiso University School of Law**

J.D., May 2009

Activities: Vice President, Hispanic Law Student Association; Scholarship Recipient, Diversity in Practice Conference 2007; Criminal Law Clinic; International Moot Court, Competitor 2007, Coach 2008; Study Abroad, Cambridge, United Kingdom.

### **Purdue University**

B.A., May 2005

Major: International Studies, emphasis in Spanish and Communications  
Activities: Founding member, City Diversity Coalition; Social Justice Student Organization; Attendee, Central American Literature Conference (*CILCA*); Attendee, Zygon Center for Religion and Science, University of Chicago; Various Externships

# Tonya Taylor

4211 First Flight Circle - Zionsville, IN 46077

Phone: 317.809.4907 - e-mail: [tonyajtaylor21@gmail.com](mailto:tonyajtaylor21@gmail.com)

## Objective

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

## Education

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

## Education Experience

### 04/17-Present **Director of Student Services**

*Purdue Polytechnic High School Indianapolis, IN*

Oversee the Special Education, ELL, and Title I programming for Purdue Polytechnic High School. Ensure services are being implemented to develop and deliver high quality services to students. Direct and advise school leaders on specific legal procedures, regulations, legislation, and programs that will guide all staff to mold the educational experiences of a diverse group of students.

### 06/12-Present **Director of Special Education**

*INISchools: Goodwill Education Initiatives Indianapolis, IN*

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

### 06/12-06/05 **Special Education Department Chair**

*Zionsville West Middle School: Zionsville Community Schools Zionsville, Indiana*

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

### 08/00-06/05 **Classroom Teacher**

*Stout Field Elementary: MSD of Wayne Township Indianapolis, IN*

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

***Additional Activities and Skills***

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

***Nakeisha T. Williams***    E-mail: [nwilliamseducator@gmail.com](mailto:nwilliamseducator@gmail.com)

6229 Carrington Dr.  
Indianapolis, IN 46236  
Mobile: (317) 910-8768

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## **EDUCATION**

### **Professional Human Resources Management (PHR)**

DePaul University  
Specializes: Employment Law, Training & Development,  
Policies & Procedures

### **M.A.E. Educational Administration and Supervision**

Ball State University

- GPA: 3.96/4.0
- School Leaders Licensure Assessment

## **CERTIFICATION**

**Professional Human Resources Management (PHR)**  
**Building Level Administrator: Indiana, Georgia and Florida (K-12)**

**Teacher Certification: Earth Space, Physical Science & Health Indiana, Georgia and Florida (5-12)**

## **EDUCATION-RELATED EXPERIENCE**

### **Education Contractor, Tutor.com**

Feb 2016-Present

- Conducts one-on-one personalized tutoring sessions in an online classroom environment
- Assists students to understand concepts through a shared whiteboard, chat and file-sharing system

### **Education Contractor, VLN Partners, LLP**

Sept 2015-Present

- Implements curriculum via asynchronous instruction
- Tracks data and progress through Learning Management System

### **E-Learning Coach/Secondary Science Instructor, MSD of Lawrence Township**

July 2014-Present

- Instructs curriculum through blended/hybrid learning programs such as Canvas
- Designs virtual classrooms for maximum learning for alternative students
- Counsel students on post-secondary career options
- Coached **National Semifinalists** for Science Invention

### **Assistant Principal, Emma Donnan Middle School**

March 2012-June 2013

- Coordinator of ISTEP State Testing and Quarterly Assessments
- Program Director for school-wide incentives for positive behavior
- Evaluator of the RTI and Special Education programs
- Hiring, Training & Recruiting Supervisor

**LEADERSHIP**

- Assistant Principal
- Team Leader
- E-Learning Coach
- Enrollment/Recruitment
- Strategic Planning & Marketing
- District Computer/Technology Initiative Pilot
- School Improvement/Title I/Alternative Education Grants
- New Teacher Mentor & Evaluator
- Professional Learning Community Leader
- Bus, Lunch, and Extra-Curricular Activities Direct Supervision
- Scheduling
- School Bell System
- Data Evaluation, Analysis, and Collection
- Progressive Discipline Plan

**PROFESSIONAL DEVELOPMENT**

- Cultural Competency & Beyond Diversity Equity Team
- PASS-Partnerships for Academically Successful Students Team
- Response-to-Instruction, Instructional Consulting and Assessment
- Project-Based and Project-Approach Coach
- Action Research- Student Engagement-Presenter
- Indiana Academy for Parent Leadership
- 100 Black Men Mentor
- Achieve 3000/Study Island/Aventa/Brainware software
- NWEA and ISTEP+
- SIOP/WIDA Training

**COORDINATOR/PRESENTER**

- School Deliverables to the Indiana Department of Education
- School Goals to Local Community Partnerships
- District-wide Girl's Character-focused Mentoring group "*Inspirations*"
- Coordinator of College/Campus Tours (annually)
- African-American Cultural Celebration Coordinator (annually)
- Awards Banquet Coordinator (annually)
- Closing of School Event Coordinator
- Professional Learning Community/Authentic Instruction Presenter, Facilitator & Trainer
- Parent Involvement Initiative- Family Resource Center - Developer & Coordinator
- Craig's Student Behavior Incentive
- No Bullying School-wide Campaign
- Action Research- Student Engagement-Presenter
- Boys' Incentive Program "Hanging with the Boys"
- Girls' "Lock-In"

**HONORS, AWARDS AND RECOGNITION**

- *Employee of the Month, Emma Donnan MS*
- *Inspirational Teacher Award, Nucor Steel and By Kids For Kids, INC.*
- *Honor an Educator Award, MSD Lawrence Township*
- *Lawrence Township Foundation Grant, MSD Lawrence Township*
- *Who's Who Among America Teachers*
- *The National Scholars Honor Society*
- *MSD of Lawrence Township's Above and Beyond Award*
- *Outstanding Future Educator, Indiana University Northwest*



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

**Attachment 2**  
**Board Member Information**  
**Forms**

Exhibit C

**Charter School Board Member Information Form**

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

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

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

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

**Background**

1. Name of charter school on whose board of directors you intend to serve:  
Vanguard Collegiate of Indianapolis
2. Your full name:  
Asia A. Bartee
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

Please see attachment

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b>Name and Title</b> Asia Bartee - HR Manager	<b>Date</b>
<b>Signature</b> 	8/30/2017

Asia Bartee  
Exhibit C

I am honored, humbled and excited to serve on the Founding Board of Vanguard Collegiate of Indianapolis. My personal goal is to live a life that creates opportunities for today's youth that helps them excel both academically and professionally. I believe that academic excellence is the foundation one needs to reach his/her professional pursuits and overarching success. I am an Indianapolis Indiana native, born and raised with a heart to serve my community specifically in advancing the education of today's youth.

My professional work experience and community contributions make me a strong founding board member. I bring a wealth of experience in human resources, organizational development, nonprofit program management, governance, and strategic planning to the board. I hold a B.S. in Human Resources from Indiana University and a MBA from Indiana Wesleyan University. My volunteer experience at Bloom Project, is focused specifically on youth development and college and career readiness. Currently, I am a Regional HR Manager at Johnson Controls specializing in employment and labor relations. As a Regional HR Manager, I am responsible for providing counsel to managers and directors. I am also responsible for analyzing and developing strategies to mitigate and manage risks, assessing labor and employment situations within the workplace, and ensuring that fair employment practices are being pursued in all lines of business. My previous work accomplishments include but are not limited to creating a management transitional program for first time managers, implementing a leadership development program that provides positive employee relations best practices, implementing an employee engagement program that has increased employee morale by 15% points, and creating HR share point sites to increase accessibility to improve employee communication and understanding of policies and procedures.

Additionally, I volunteer as the Deputy Director of Bloom Project Inc., a local 501 c3 nonprofit organization that focuses on providing academic and professional opportunities to youth. Bloom Project provides mentoring, service projects, college preparation, character building, and career exploration opportunities currently operating in Indianapolis and Ft. Wayne. Bloom Project's goal is to prepare young males, ages 12-18, for secondary education and increase knowledge in their career paths. As the Deputy Director, I am responsible for managing Program Directors and ensuring that program objectives and goals are accomplished. I also attend Board meetings on a regular basis providing HR guidance and counsel as needed. It has been my pleasure to launch two free all-male group mentoring programs for the Indianapolis community -- Project King and Royal Mentality, which focus on character development and career and college preparation, respectively. Both programs combined gave over 200 young men of color the opportunity to network with career professionals, attend college tours/fairs, become more engaged in the Indianapolis community through service learning, and reap the benefits of having a mentor.

Both my professional and community contributions have led me to this prime opportunity to serve as a Vanguard Collegiate of Indianapolis Founding Board Member. As a board, we have participated in training with the proposed Head of School, Robert Marshall, learning more about the school design and mission. I have attended founding board meetings and an all-day board retreat to gain a better understanding of how Vanguard Collegiate will differentiate itself from other schools in the community. We have been trained on components of school operations, goals, and objectives. Additionally, we have learned the difference between governance and management, which has helped me to better recognize how I can contribute to the Board.

I intend to fully utilize my professional and community expertise to ensure Vanguard Collegiate of Indianapolis is governed in accordance to the law, is a good steward of the public funds we are entrusted, and that the school fulfills the promises set forth in our charter application. I am fully committed and

excited to work alongside the rest of the Founding Team to build Vanguard Collegiate of Indianapolis for students here in Indianapolis.

Exhibit C

**Charter School Board Member Information Form**

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

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

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

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

**Background**

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

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

**Name and Title**

Molly Chamberlin, Executive Director

**Signature**



**Date**

8/30/2017

Molly Chamberlin  
Exhibit C

It is an honor to serve on the Founding Board of Vanguard Collegiate. As the daughter of two school teachers and someone who has worked in education and education-related fields for many years, I am passionate about supporting access to high quality education. I was born in Indianapolis and am proud to still call the city home. However, through my work in K-12 and higher education policy, I have seen firsthand that not all children in the city and state are offered the same opportunities. I am committed to ensuring that regardless of ZIP code, all kids in Indy have the chance to go to a high quality, safe school where they are able to cultivate their skills and critical thinking, as well as being taught the importance of high standards and expectations. I strongly believe that Vanguard Collegiate is the exemplar of such a school.

I believe my education and experience in the areas of government and non-profits, as well as research, evaluation, assessment, and accountability uniquely position me to be able to provide great contributions as a board member for Vanguard Collegiate. I have extensive experience working in education policy, both at the K-12 and higher education levels. Further, I have played key roles in the development and application of accountability systems, such as Indiana's A-F accountability for K-12 schools and Indiana's performance funding formula for higher education. As such, I am well-versed in assessments and education-related data. In addition, I bring a rich background in statistical and data analysis for research and evaluation. I have designed and led large- and small-scale evaluations for K-12 and non-profit initiatives, which has given me a deep understanding of the importance of defining outcomes, setting metrics to measure those outcomes, and communicating progress widely to various stakeholders. I hold a Ph.D. in Educational Psychology from Indiana University, with a focus on cognitive sciences. As such, I have a strong understanding of the ways in which people learn and mechanisms to maximize learners' potentials.

I currently serve as Executive Vice President at Thomas P. Miller and Associates, a national and international consulting firm, where I oversee practice areas that focus on research and evaluation, workforce development, and economic development. In this role, I am frequently called upon to assist clients in identifying the ways in which they can work closely within their communities to improve educational and economic conditions. Our firm frequently utilizes research and evaluation techniques to support data-driven decision making for these projects, as well as using a wide variety of mechanisms to engage stakeholders. I believe these skills will be useful as a board member for Vanguard Collegiate, as I intend to capitalize on my ability to analyze data and information and transform it into valuable and useful information that the board and school leader can use to ensure that the school is seen as an asset to the community, and that the school is delivering on its promises.

I also have experience prior to coming to TPMA that I believe will be valuable in my role as a board member. To illustrate, I served on the founding board of a charter school in 2011-2012. However, due to difficulties in securing a facility as well as challenges with the Charter Management Organization that the founding board was working with, the board requested that the authorizer revoke the charter and the school did not open. While my experience on that board lasted only a few months, I learned very much about board governance, effectively planning for facilities, budgeting, and the importance of careful decision making when electing to work with a CMO. In addition, I have over five years of experience working directly with charter schools and alternative schools. As the Director of Student Learning Choices for the Indiana Department of Education from 2004-2009, I had the opportunity to assist charter schools during their planning and start-up phases, as well as designing effective monitoring and accountability systems for both charter schools and alternative schools in Indiana. In addition, our board has received reading and training materials, such as Charter Board University, to make us more effective as a cohesive board unit. We have discussed in detail the differences between governance and

management, the importance of understanding these differences, and the ways in which a board can be the most successful. Further, we have participated in a board retreat, where we had the opportunity to discuss in detail the mission and vision of Vanguard Collegiate; its goals, objectives, and accountability plan; and other components of the school that will contribute to its success. The board retreat was a chance for each founding member to discuss collaboratively, ask reflective questions, and commit further to supporting the school. We have also received support from Building Excellent Schools in the form of training and discussion materials.

I am excited about serving as a Founding Board member for Vanguard Collegiate. I fully intend to utilize my passion for high-quality education for all, as well as my background in educational psychology, data analysis and research, and evaluation, to support the school to the greatest extent of my abilities. I am fully committed and excited to work with the other, highly talented members of the Founding Board to ensure that Vanguard Collegiate is one of the most effective and impactful schools in my hometown.

Exhibit C

**Charter School Board Member Information Form**

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

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**Background**

1. Name of charter school on whose board of directors you intend to serve:  
Vanguard Collegiate of Indianapolis
2. Your full name:  
Sibeko Jywanza
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

Please see attachment.

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b><u>Name and Title</u></b> Sibeko Jywanza, Director of Food Justice, Flanner House <b><u>Signature</u></b> Sibeko Jywanza	<b><u>Date</u></b> 9-1-17

Sibkeo Jywanza

Exhibit C

I am honored and humbled to serve my community of Indianapolis, and especially of Haughville where I live, as a member of the founding team of Vanguard Collegiate of Indianapolis. I believe education has the power to change an individual, and in turn, individuals change communities. I come from a long line of community-focused servant leaders that instilled in me a love for Indianapolis and a passion for empowering young people. Serving on the Founding Team affords me a unique opportunity to learn and to advocate for the community in which I reside.

I earned a BS in Business Administration from Florida A & M University School of Business and Industry (SBI). I am also a proud alum of Piney Woods School, one of four remaining historically African-American boarding schools in the United States. Both institution taught me that I have a responsibility to engage in work that uplifts my community.

Early in my career, I was a Neighborhood Development Specialist for Indianapolis Neighborhood Resource Center (INRC). I engaged in neighborhood and citywide outreach and public relations. I also assisted in creating partnerships between residents, neighborhood groups, faith-based organizations, city/state government, health/ human service providers, community development corporations, multi-service centers, job training providers, educational institutions, housing organizations, local businesses, and other community assets. One of the most beneficial parts of my time with the organization was participating in Community Leadership Courses. It was there I learned about Asset Based Community Development (ABCD). This strategy for sustainability suggests that those working to improve a community must identify and leverage its assets to address its needs. As a resident of Haughville, I am painfully aware of the area's educational deficits. Vanguard Collegiate's innovative approach of inspiring, empowering, and teaching students to build their community is something that excites me about Board membership and that strengthens my desire to be an effective Board member.

Currently I am the Director of Food Justice for the Flanner House, the longest running Community Development Corporation in Indianapolis. We provide fresh produce in an area that is labeled as a 'food desert.' In this role, I introduce young people, ages 18 to 24, to farming basics and teach them the importance of fresh produce and how to maintain it. Additionally, as a volunteer, I serve in a leadership capacity on The Indianapolis Kwanzaa Committee. I am also a member of the Indianapolis Urban League's The Exchange Young Professional Group. I have and continue to speak on behalf of marginalized communities as part of the Advocacy Team for OpprotunIndy. I am also a regular volunteer mentor at the Indianapolis Juvenile Justice Center.

I am committed to using my skills, education, professional experience, and my volunteer experience to advance the mission of Vanguard Collegiate of Indianapolis. Additionally, I plan to leverage my extensive community partnerships, built through both my professional and my volunteer experience, to help fulfill the mission of Vanguard Collegiate.

Exhibit C

**Charter School Board Member Information Form**

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

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**Background**

1. Name of charter school on whose board of directors you intend to serve:  
Vanguard Collegiate of Indianapolis
2. Your full name:  
Daniel Levine
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

Please see the attachment.

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b><u>Name and Title</u></b> Daniel Levine, IT Vendor Manager <b><u>Signature</u></b> Daniel Levine	<b><u>Date</u></b> 9/1/2017

Dan Levine

Exhibit C

I am truly honored to be a part of the Founding Team of the Vanguard Collegiate of Indianapolis. I am passionate about education and believe everyone should have an opportunity to the same level of education, which will lead to success in life. Being a part of something as big as this is humbling. I view this as a chance to be a part of something that can impact the residents of the community, making it a neighborhood that people are proud to be part of. When raising my daughter, her mother and I made a conscious decision to move to Hamilton Country to improve her chances of getting a better education. I looked at test scores and percentage of students who went to college. That is a shame and should not be the norm. I am committed to changing this reality through my work with Vanguard Collegiate of Indianapolis. Hopefully, all our children will end up on a path to college.

My education, work experience, and professional achievements position me to be an active and effective member of the Board of Directors of Vanguard Collegiate of Indianapolis. I bring a strong background in Financial Management, Purchasing, Strategy and Business and Operational Administration to the Board. With over 25 years serving in Corporate America for companies like Herff Jones, Office Depot, Thomson, Cummins, Anthem, Finishmaster, I have an extensive background in both strategic and tactical planning, project management and budgeting. I have worked within manufacturing, construction, real estate, human resources, IT, and other categories. As an IT Vendor Manager, I actively and regularly participate in board meetings and committee meetings.

I hold a B.S. in Human Resource Management from the Palm Beach Atlantic University. I am active in the community and currently, serve on the Board of Lilly Boys and Girls Club of Indianapolis and the Indiana Addictions Issues Coalition. Previously, I was on the Board of the Institute of Supply Management of Indiana.

In addition to monthly founding team meetings, I have had numerous one-on-one meetings with the proposed Executive Director, Robert Marshall, to learn more about Vanguard Collegiate of Indianapolis academic design and mission. Our team also had a full day planning retreat, with support from Building Excellent Schools, at which we reviewed and discussed all the major components of our school design. We have also had several discussions about the role and responsibility of the board upon authorization and have discussed at length the distinction between management and governance. As a group, we also read and discussed *Charter School Board University*, to further reinforce our knowledge and ability to govern a charter school.

I also plan to join Mr. Marshall in meetings with accounting and finance back-office providers to review and provided feedback on our proposed budget and financial processes to prepare to provide effective oversight and guidance to Vanguard Collegiate. I intend to fully utilize my professional expertise and experience to ensure Vanguard Collegiate of Indianapolis is financially stable in the short- and the long- term and that the school achieves the promises set forth in our charter application. I am fully committed and excited to work alongside the rest of the Founding Team to build Vanguard Collegiate for students here in Indianapolis.

Exhibit C

**Charter School Board Member Information Form**

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

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

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

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

**Background**

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

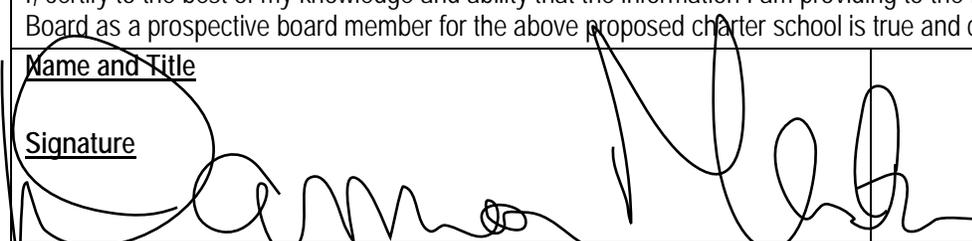
Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<u>Name and Title</u>	<u>Date</u>
<u>Signature</u> 	

Damon Martin

Exhibit C

I am honored to serve on the Founding Team of Vanguard Collegiate of Indianapolis. I believe that quality education is the most important tool for success in life and it significantly impacts our city's residents' quality of life, neighborhood crime levels, and why people choose where they reside and raise a family. I am proud to be a resident of Marion County where I raised my five children with my spouse. While our family is able to access quality educational opportunities for our children, this same opportunity is not afforded to far too many families on the new west side. I am committed to changing this reality through my work with Vanguard Collegiate of Indianapolis, ensuring all our students are on a path to college.

My education, volunteer experience, and professional achievements position me to be an active and effective member of the Board of Vanguard Collegiate of Indianapolis. I bring a strong background in financial operations, human resource and governance administration to the Board. I hold a B.S. in Communications and a minor in Economics from Indiana University-Indianapolis and a MBA from Indiana Wesleyan University. I also hold a Six Sigma Green Belt certification. Currently, I serve as the Senior Director of Talent Management for Home Point Financial Corporation. I actively manage talent acquisition. As a leader for Home Point Financial Corporation, I actively participate in nonprofit board meetings and committee meetings on a regular basis.

Prior to joining Home Point Financial, I served as Director of Talent Management for OneAmerica. Prior to that, spent nine years with Indiana University Health in the Revenue Capture division as a Director of Affiliate Operations where I was responsible for all aspects of operations, business development and revenue capture. In addition to this experience, I also held several leader roles within financial services organizations including banking, brokerage and financial sales.

I am also an engaged member of the Indianapolis community. I am an active member of 100 Black Men, and a mentor for 100 Black Men, working with 7th graders to provide guidance and direction both in academics and civic responsibility. As a Board Officer and Co-Lead of the Finance Committee for EmployIndy, I understand the connection between higher education and accessing gainful employment opportunities that ultimately drive deeper community and social benefits for individuals, families, and Indy as a whole. As a council member for Hispanic Business Council, I am working to connect and uplift advocacy for diversity efforts in business across all spectrums of people and organizations. I have also partnered with Junior Achievement, as a chair for the 'JobSpark' program that hosted a two-day event for 7000 IPS 8th graders, which exposed students to the growth mindset, connecting interests to potential careers, while creating a lasting impression and connection to career aspirations.

To supplement my nonprofit governance experience, our Board has been working diligently to master the governance and oversight role for a high-performing public charter school. We have studied our academic and other performance outcomes and understand that the school must meet these goals. In addition to our monthly founding team meetings our team also had a full day planning retreat, with support from Building Excellent Schools, at which we reviewed and discussed all the major components of our school design. We have also had several discussions about the role and responsibility of the board upon authorization and have discussed at length the distinction between management and governance. As a group, we also read and discussed Charter School Board University, to further reinforce our knowledge and ability to govern a charter school.

I intend to fully utilize my professional expertise and experience to ensure Vanguard Collegiate of Indianapolis is financially stable in the short- and the long-term and that the school achieves the promises set forth in our charter application.

I am fully committed and excited to work alongside the rest of the Founding Team to build Vanguard Collegiate of Indianapolis for students here in Indianapolis

Exhibit C

**Charter School Board Member Information Form**

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

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

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

**Background**

1. Name of charter school on whose board of directors you intend to serve:  
Vanguard Collegiate of Indianapolis
2. Your full name:  
Juan Pablo Roman-Lagunas
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

Please see attachment.

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b><u>Name and Title</u></b> Juan Pablo Ramon-Lagunas, Partner <b><u>Signature</u></b> Juan Pablo Ramon-Lagunas	<b><u>Date</u></b> 9-1-17

Juan Pablo Roman-Lagunas

Exhibit C

I am honored to have the opportunity to work with my fellow Founding Board members of Vanguard Collegiate of Indianapolis. As a committed and active member of our community, I recognize the need for quality education in our neighborhoods, and look forward to contributing to the realization of Vanguard Collegiate's mission. As an attorney that has worked very closely with impoverished juveniles, as well as their parents, I have a unique perspective on the challenges that are faced by the children of Indianapolis in the classroom, at home, and in the community.

My experience as an attorney will prove valuable to Vanguard Collegiate. I have an extensive understanding, both in terms of policy and practice, of the legal challenges that are faced by schools, parents, and children. I have experience in administrative education law, and have spent years working on policy issues regarding the "school to prison pipeline."

Additionally, I have practical experience that is directly applicable to the needs of this Board. Specifically, my clients include businesses and educational institutions which I regularly counsel on legal matters consisting of general legal issues, contract negotiations for multimillion-dollar construction projects, acquisitions, and labor issues. I regularly advise executives and board members, in both the private and public sectors.

I am fully committed to Vanguard Collegiate and its noble objectives. I have the utmost confidence in our Lead Founder, Robert Marshall. Our board has been meeting regularly since the fall of 2016 and we are studying and preparing for our role in providing governance and oversight to ensure that Vanguard Collegiate achieves its established academic outcomes, is financially stable, and operates a safe and nurturing school for Indy students. We have and will continue to have support from Building Excellent Schools in this endeavor. I look forward with great optimism to the impact Vanguard Collegiate will have on the Indianapolis community, and am eager to bring such a wonderful opportunity to the children of our neighborhoods.

Exhibit C

**Charter School Board Member Information Form**

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

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

**Background**

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

**Disclosures**

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

- I/we do not know any such persons.  Yes
3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I/we do not anticipate conducting any such business  Yes
4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship  
 Not applicable  I/we do not know any such persons  Yes
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 Not applicable  I/we have no such interest  Yes
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 Not applicable  I/we or my family do not anticipate conducting any such business  Yes
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family  Yes
8. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  
 None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b>Name and Title</b> Director of Student Services <b>Signature</b> Tonya Taylor	<b>Date</b> 8/28/17

Tonya Taylor

Exhibit C

I am humbled and honored to serve on the Founding Board of Vanguard Collegiate of Indianapolis. I have committed my life to ensuring regardless of race, background, ability, or gender students have access to high quality educational opportunities. I have been in education for nearly twenty years. During that time, I have worked in educational settings K-12. I feel passionate that students with disabilities have access to opportunities that allow them full membership in their community. It is imperative that educational opportunities such as Vanguard Collegiate exist to provide such opportunities.

My professional background and experience contribute to making me a strong Founding Board member. I hold a B.S. in Elementary Education for University of Southern Indiana and a Masters Degree in Special Education from Indiana University. Additionally, I hold an Administrative License and am a licensed Director of Special Education.

I bring an extensive amount of charter school experience to the Founding Board. I have been involved in the charter school arena for over five years. During this time, I helped to write and secure multiple charter school applications. I have assisted in the pre-opening, opening, and implementation process for eight successful charter schools in with Indianapolis area. In addition, I have been involved with an authorizer audit process.

In my current role at Purdue Polytechnic High School, I oversee the Special Education, ELL, and Title I grant application process. As the Director of Student Services, I am charged with ensuring all services are being implemented to develop and deliver high quality services to students. Additionally, I direct and advise school leaders on specific legal procedures, regulations, legislation, and programs that will guide all staff to mold the educational experiences of a diverse group of students.

Both my educational and work experiences have led me to this opportunity to serve as a Vanguard Collegiate of Indianapolis Founding Board Member. I fully intend to utilize my educational background and professional expertise to ensure the success of Vanguard Collegiate of Indianapolis. I am committed and honored to work alongside Robert Marshall and the Founding Team to support the students and community of Vanguard Collegiate of Indianapolis.

Exhibit C



**Charter School Board Member Information Form**

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

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**Background**

1. Name of charter school on whose board of directors you intend to serve:  
Vanguard Collegiate of Indianapolis
2. Your full name:  
Nakeisha Tanae Williams
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

Please see attachment

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

**Disclosures**

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

I/we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

I/we do not anticipate conducting any such business  Yes

4. If the school intends to contract with an Education Service Provider, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship

Not applicable  I/we do not know any such persons  Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

Not applicable  I/we have no such interest  Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family  Yes

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

None  Yes

I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect.	
<b><u>Name and Title</u></b> Nakeisha Tanae Williams <b><u>Signature</u></b>  <i>Nakeisha Tanae Williams</i>	<b><u>Date</u></b> 6/29/2017

Nakeisha Williams

Exhibit C

I am honored to serve on the Founding Board of Vanguard Collegiate of Indianapolis. I am a highly motivated individual and excited at the prospect of bringing a world class school to the city of Indianapolis.

For the past fifteen years, I have worked in the field of education as an Assistant Principal, classroom teacher, team leader, advisor, mentor, sponsor, presenter, facilitator, grant writer and program coordinator. Currently, I am the Chief Science Instructor for all Sciences at Lawrence Advance Academy in Lawrence Township. I hold a Secondary Science Teacher's license and a K-12 Building- Level Administrator's license in the states of Indiana, Florida & Georgia. Additionally, I am currently pursuing a Graduate Certificate and Licensure in Teaching English to Speakers of Other Languages (TESOL).

I served as a Founding Advisor of the two Indianapolis Metropolitan Career Academies in 2004. I developed standard operating policies and procedures for the two academies alongside other educators and Goodwill employees. Additionally, I was selected to be the Assistant Principal of Emma Donnan Middle School in Indianapolis, IN. Emma Donnan Middle School was one of the three turnaround schools that are currently being ran by CharterSchoolsUSA. Our work was featured in the Indianapolis Star newspaper as a positive and productive agent of change for Emma Donnan Middle School from "tumultuous to triumphant" in a school year.

I am committed to leveraging my experiences and knowledge in both areas of education and business for the Founding Board of Vanguard Collegiate of Indianapolis. I hold being a Board member as the utmost important opportunity thus far in my educational career. I will represent the board with respect and dignity at all times. I look forward to working with the fellow board members to ensure that we are held accountable to the students and community of Indianapolis.



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 3**

## **Decision Making Authority**

Exhibit D

**Decision-Making Authority**

<u>Function</u>	<u>Governing Board</u>	<u>School</u>
<u>Performance Goals</u>		
<u>Curriculum</u>		
<u>Professional Development</u>		
<u>Data Management and Interim Student Assessments</u>		
<u>Grade Level Promotion Criteria</u>		
<u>Culture</u>		
<u>Budgeting, Finance, and Accounting</u>		
<u>Student Recruitment</u>		
<u>School Staff Recruitment and Hiring</u>		
<u>HR Services (payroll, benefits, etc.)</u>		
<u>Development</u>		
<u>Community Relations</u>		
<u>Information Technology</u>		

<u>Function</u>	<u>Governing Board</u>	<u>School</u>
<u>Facilities Management</u>		
<u>Vendor Management / Procurement</u>		
<u>Other Operational Functions, if any</u>		



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 4**

## **Course Scope and Sequence**

**Attachment 4: Provide a core curriculum scope and sequence by subject, for each grade level proposed, that demonstrates clear alignment with Indiana’s Academic Standards including:**

- a. How the school’s curriculum is integrated across subjects and grade levels served
- b. How it will result in proficiency
- c. A timeline outlining the curriculum development process (including individuals and/or consultants responsible for this task) during the school’s pre- opening year.

**Curricular Development Timeline**

Vanguard Collegiate’s curriculum, from the Scope and Sequence to the daily lesson plan, will be developed in alignment with the Indiana Academic Standards (IAS) and standards for College and Career Readiness. All purchased curriculum and materials will be modified to ensure full alignment with the standards. Upon authorization, we will strategically use our planning year (November 2017– June 2018) to build our Course Scope and Sequences, End of Course Assessments, Interim Assessments, and exemplar unit and lesson plans. This includes but is not limited to hiring a Dean of Curriculum and Instruction (“DCI”) who will work closely with the Executive Director to research curriculum and implementation of best practices, develop course documents, and prepare for staff Professional Development.

Together, the Executive Director and Dean of Curriculum and Instruction are responsible for the selection, purchase, development, implementation, and evaluation of the curriculum, ensuring alignment with state and national standards, as well as, alignment with college readiness benchmarks<sup>1</sup>. They will determine the scope and sequence of standards and skills and develop the unit and interim assessments for each grade level and content area. The end of course assessments and college preparatory curriculum content will also be aligned to the rigor of the Indiana state assessments. From unit plans and assessments to the daily lessons and objectives, all curriculum and content instruction at Vanguard Collegiate will drive towards college readiness, as evidenced on end of course assessments.<sup>2</sup> An outline of the curricular development timeline can be found in **Figure 4.1**.

**Figure 4.1: Curriculum Development Timeline**

Time	Action
<b>June 2017 - September 2017</b>	Executive Director, in collaboration with BES coach, began to review curriculum and create alignment guides with the Indiana Academic Standards, ensuring alignment between open source or purchased curriculum and the IAS.  Executive Director begins recruitment for Dean of Curriculum and Instruction.  Executive Director recruits volunteer Curriculum Team to provide consultation on curriculum throughout the year.
<b>October 2017</b>	Executive Director completes standards alignment guide between curricular resources and the Indiana Academic Standards.
<b>November-January 2018</b>	The Curriculum Team reviews the standards alignment guide created by the Executive Director, creates an assessment bank consisting of grade level and subject appropriate sample questions and correlated passing guide. To push rigor and college readiness, the team will use criterion from norm referenced tests and sample work from regional college preparatory schools.

<sup>1</sup> To be completed with the support of Building Excellent Schools and with resources from high performing schools within the BES network.

<sup>2</sup> Wiggins, Grant, and Jay McTighe,. Understanding by Design, Expanded 2nd Edition (Page 17). Association for Supervision & Curriculum Development. —

<b>January-March 2018</b>	As hired, the Dean of Curriculum and Instruction will work with Executive Director and Curriculum Team to finalize curricular choices and build course a Scope and Sequence, Final Exam, and Interim Assessments for 5 <sup>th</sup> and 6 <sup>th</sup> grade ELA, Math, Science, and Social Studies.
<b>March-June 2018</b>	The Dean of Curriculum and Instruction will create a Scope and Sequence for Co-Curricular courses and Exemplar Unit and Lesson plans for all courses. Executive Director will review all course documents with support of the Curriculum Team.

To ensure that our curriculum meets a rigorous and objective bar consistently, we will teach to all demands of the Indiana Academic Standards (IAS), which include English Language Arts, Mathematics, Science & Computer Science, and Social Studies. For academic co-curricular classes, we will teach other classes identified by the Indiana State Department of Education including Fine Arts and Information Technology. A map of courses from 5<sup>th</sup> through 8<sup>th</sup> grade can be found in **Figure 4.2**.

**Figure 4.2: Courses by Subject and Grade Level**

Subject	Grade 5	Grade 6	Grade 7	Grade 8
<b>Mathematics</b>	Math 5	Math 6	Pre-Algebra	Algebra I
<b>Reading</b>	Literacy 5	Literacy 6	Literacy 7	Literacy 8
<b>Writing</b>	Writing 5	Writing 6	Writing 7	Writing 8
<b>Power Hour</b>	Reading Power Hour Math Power Hour			
<b>Social Studies</b>	US History	Western World History	World History	US Government
<b>Science</b>	Physical Science	Earth and Space Science	Life Science	Engineering & Technology
<b>Co- Curricular</b>	Critical Thinking 1	Critical Thinking 2	Service Learning	Exploring College and Careers
	Art	Visual Art	Creative Dramatics	Exploring Music
	Coding	Coding	Coding	Coding
	Physical Education	Physical Education	Physical Education	Physical Education

Vanguard Collegiate will implement high quality, research-based curriculum as available and as aligned to both state and national standards, and supplement this curriculum with an internally created scope and sequence, interim and unit assessments, and end of year assessment. The identified curricular resources that will be used to develop Vanguard Collegiate’s curriculum include:

- **EngageNY** will be our primary source to build our Scope and Sequence for ELA and Mathematics. The Executive Director and Dean of Curriculum and Instruction will create a sequence that draws from EngageNY and aligns with the Indiana Academic Standards and use that scope and sequence to build end-of-trimester and end-of-year assessments. EngageNY drives towards college and career ready benchmarks and has been successfully implemented in high-achieving schools with a similar student population.<sup>3</sup>
- **Achieve3000** will be used as a core component of ELA curriculum.<sup>4</sup> During Reading Power Hour, students reading at or below grade level will use this online differentiated instruction literacy solution to receive grade-appropriate intervention matched to their individual Lexile level for all students - below, at, and above grade level. Because the software is adaptive, the rigor increases as students’ abilities grow, as measured by regular assessments on standards aligned skills and comprehension.
- **College Preparatory Mathematics (CPM)** offers a complete mathematics program for grades 6 through

<sup>3</sup> <https://www.engageny.org/about>.

<sup>4</sup> <http://www.achieve3000.com/about-us/>.

12 and is designed to engage all students in learning mathematics through problem solving, reasoning, and communication. We will use CPM to balance procedural fluency (algorithms and basic skills), deep conceptual understanding, strategic competence, and adaptive reasoning (transference and extension).<sup>5</sup>

- **Nexus**<sup>6</sup> is an adaptive virtual learning space that facilitates the most success methods of retaining mathematical fundamental knowledge. Student collaboration is fostered in order for students to get a deeper understanding of course materials through discussion. It also creates a real time knowledge base, saving problems that students solve and allowing others to learn from steps they used to solve. Nexus will be used in Power Hour and tutoring to push student mathematical understanding and independent thinking.
- **Fountas & Pinnell Literacy** is a comprehensive, systematic design for high-impact literacy instruction. We will use it for professional development, assessments, to provide effective intervention, and classroom resources to elevate our literacy teaching and student learning.<sup>7</sup>

**Figure 4.3** displays academic resources Vanguard Collegiate will utilize to create rigorous, standards-aligned curriculum. The exact programs and materials used as supplemental curriculum will be finalized during the 2017-2018 planning year.

**Figure 4.3: Curricular Resources**

Resources	Subject(s)			
	English	Math	Science	Social Studies
<b>Core Curriculum</b>				
*Achieve 3000	X		X	X
*Nexus		X	X	
College Preparatory Mathematics		X		
EngageNY	X	X		X
<b>Supplemental Curriculum</b>				
FOSS Science Curriculum			X	
*Zeal		X		
Achievement First	X	X	X	X

**Literature.** The purpose of the Literature course at Vanguard Collegiate is to teach students to read, write, think and discuss worthy, complex texts. Students will engage daily with classic, grade level literature and daily lessons drive at the attainment of grade level end of year benchmarks. **Figure 4.4** displays the end of the year benchmarks for each grade level. **Figure 4.5** displays a sample reading lesson agenda.

**Figure 4.4: Reading End of Year Benchmarks**

Grade	Benchmarks
5	Reading at F&P Level T; Texts at or above 900 Lexile; Mastery of 5 <sup>th</sup> Grade Indiana Academic Standards
6	Reading at F&P Level W; Texts at or above 1000 Lexile; Mastery of 6 <sup>th</sup> Grade Indiana Academic Standards
7	Reading at F&P Level Z; Texts at or above 1050 Lexile; Mastery of 7 <sup>th</sup> Grade Indiana Academic Standards
8	Reading above F&P Level Z; Texts at or above 1100 Lexile; Mastery of 8 <sup>th</sup> Grade Indiana Academic Standards

**Figure 4.5: Reading Lesson Daily Agenda**

Element	Time	Description
Do Now	7 min	Option 1: Based on trends from the prior day's Student Work Analysis, the teacher highlights a common misconception, addresses an error in student work, or provides additional practice with a specific standards-based question type.

<sup>5</sup> <http://cpm.org/cc-program-description>.

<sup>6</sup> Used by schools such as Purdue Polytechnic High School, Indianapolis Pubic Schools, Indiana University, Purdue University, Indiana State University, and University of Toledo. <https://vimeo.com/231145249?ref=em-share>

<sup>7</sup> <http://www.fountasandpinnell.com/intro/>

		Option 2: Students read grade-level appropriate non-fiction text to gain background knowledge to supplement understanding of class novel.
Frame	3 min	Teacher briefly introduces the text or excerpt for the day, breaks down prompt with students, and highlights a transferrable reading or annotation strategy.
Time in Text	25 min	Students spend time during class in accountable independent reading, either individually, with partners, or in a small group, participating in group text analysis, and completing independent written analysis of text. The teacher actively circulates the room to give feedback on annotations, question responses, oral fluency (if applicable), pacing, and stamina. The teacher pauses the class 1-3 times to provide batch feedback or address a common misconception.
Discussion	5 min	Students use accountable talk to discuss the standards-based focus question of the day.
Exit Ticket	10 min	Students write an academic paragraph in response to the focus question of the day.

**Standards Focus.** All Reading units are standards-based and students get targeted practice and spiraled review of prioritized standards in each unit. Each unit has a core text or anthology, as well as an aligned text bundle that is provided to teachers from EngageNY. Daily, students answer short response and multiple choice questions aligned to the unit-based standards focus. This method ensures that all students get ample practice and frequent feedback with a variety of question types within each genre and teachers can use data precisely to make instructional decisions for the class as a whole and at the individual student level. Interim Assessments are designed to test the focus standards and review standards from each unit and data from internal assessments as well as weekly quizzes is used to determine review standards for upcoming units. **Figure 4.6** displays the EngageNY sample scope and sequence for 5<sup>th</sup> grade ELA.



**Figure 4.6: EngageNY Sample Scope and Sequence 5<sup>th</sup> Grade English Language Arts**

	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4 <sup>1</sup>
<b>Focus</b>	Becoming a Close Reader and Writing to Learn	Researching to Build Knowledge and Teaching Others	Researching to Build Knowledge and Teaching Others	Considering Perspectives and Supporting Opinions	Considering Perspectives and Supporting Opinions	Gathering Evidence and Speaking to Others
<b>Module Title</b>	Stories of Human Rights	Biodiversity in Rainforests of the Western Hemisphere	Inventions that Changed Peoples Lives	Sports and Athletes' Impact on Culture	Balancing Competing Needs in Canada	Natural Disasters in the Western Hemisphere <sup>8</sup>

<sup>8</sup> Based on field feedback, the novel *Dark Water Rising* has been removed from 5M4. Districts using 5M4 in the 2013-14 school year: teach just Units 1 and 3. For 2014-15, Unit 2 of 5M4 will be revised. *Eight Days: A Story of Haiti* will remain. The new unit will not require any new text purchases.



	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4 <sup>2</sup>
<b>Description</b>	<p>What are human rights, and how do real people and fictional characters respond when those rights are challenged? Students read closely the introduction and selected articles of the Universal Declaration of Human Rights (UDHR), paired with firsthand accounts of real people facing human rights challenges. They then study <i>Esperanza Rising</i>, applying their new learning about human rights as one lens through which to interpret character and theme. Finally, students revisit the text and themes of the UDHR and <i>Esperanza Rising</i> as they prepare and</p>	<p>This module (which could be used in conjunction with a study of Latin America) features a close read of <i>The Most Beautiful Roof in the World</i>, which describes the work of scientists documenting rainforest biodiversity. Students build knowledge about the rainforests and how scientists closely observe the natural world to then help them communicate their research. They then do a case study of Meg Lowman, the researcher featured in <i>The Most Beautiful Roof in the World</i>. Finally, students examine the qualities of field guides and journals, research</p>	<p>Students learn about new or improved technologies that have been developed to meet societal needs and how those inventions have changed people’s lives. They conduct authentic research to build their own knowledge and teach others through writing. Students read the graphic novel <i>Investigating the Scientific Method with Max Axiom, Super Scientist</i> as well as several informational articles about inventions in order to write a short opinion paragraph about which of the inventions they learned about has been most important to people and why. Students conclude the</p>	<p>Students learn about the importance of sports in American culture. They read the challenging biography <i>Promises to Keep: How Jackie Robinson Changed America</i>, focusing on Robinson as a case study of an athlete who broke societal barriers. They also analyze how Sharon Robinson provides evidence to support her opinions. Next, students research either Althea Gibson or Roberto Clemente, both of whom broke cultural barriers. Finally, students write an opinion letter to a publishing company explaining the need for a biography about that athlete given his/her impact on society.</p>	<p>Students explore how native Inuit and other people of Canada have used the natural resources available to meet their needs. They read <i>The Inuit Thought of It: Amazing Arctic Innovations</i>, to learn about how the native Inuit people of Canada used natural resources to meet the needs of their community hundreds of years ago. They then read/view a variety of informational texts and media to examine how the resources in Canada are used meet the needs and wants of people throughout the Western Hemisphere, today. Finally, students reflect upon</p>	<p>This module integrates science and social studies content. Students read literature set during a natural disaster: the beautifully illustrated picture book <i>Eight Days: A Story of Haiti</i> and the novel <i>Dark Water Rising</i>. They analyze how the narrator’s perspective determines how events are described. Then, students conduct a short research project about Haiti and the Red Cross, and ultimately draft and revise an opinion speech in which they take a stand on what role humanitarian organizations should take when neighboring countries are struck by natural disasters. They</p>



	perform a Readers Theater.	either ants or butterflies of the rainforest, and produce an informational report and a field journal– style page for younger readers.	module by conducting research about one of two inventions, Garrett A. Morgan’s traffic light or the Wright brothers’ airplane in order to develop a narrative in the form of a graphic novelette about the invention they researched. <sup>9</sup>		two points of view regarding a current mining project that has been proposed for development in a present- day Inuit community and express their opinion in the form of an editorial essay.	deliver this speech to the class.
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<sup>9</sup> Based on field feedback, the novel *Dark Water Rising* has been removed from 5M4. Districts using 5M4 in the 2013-14 school year: teach just Units 1 and 3. For 2014-15, Unit 2 of 5M4 will be revised. *Eight Days: A Story of Haiti* will remain. The new unit will not require any new text purchases.



	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
<p><b>Texts (central text(s) in bold)</b><sup>3</sup></p>	<ul style="list-style-type: none"> <li>• Readers on Stage, Aaron Shepard (RL Reader’s Theater, NL)</li> <li>• “The History of the United Nations,” <a href="http://www1.umn.edu/humanarts/edumat/hreduseries/hereandnow/Part-1/whatare.htm">http://www1.umn.edu/humanarts/edumat/hreduseries/hereandnow/Part-1/whatare.htm</a> (excerpt) (RI, NL)</li> <li>• <i>Fluency Practice Read- Aloud Plays: Grades 5- 6: 15 Short, Leveled Fiction and Nonfiction Plays with Research-Based Strategies to Help Students Build Fluency and Comprehension</i>, Kathleen M. Hollenbeck (RL Reader’s Theater, NL)</li> <li>• <i>Readers Theater Grade 5</i>, Michael</li> </ul>	<ul style="list-style-type: none"> <li>• Transcript: “Great Bear Rainforest Remote Camera Project” (RI, 1250L)</li> <li>• <b><i>The Most Beautiful Roof in the World</i></b>, Meg Lowman (RI, 1160L)</li> <li>• “Meg Lowman Interview: Questions and Answers,” adapted from Smithsonian and Visitraleigh .com (RI, 1110L)</li> <li>• “Amazon Rainforest,” Phyllis Barkas Goldman (RI, 1030L)</li> <li>• “Sloth Researcher: Bryson Voirin,” The Wild Classroom interview (RI, 950L)</li> <li>• “Hawaii’s Endangered Happy Face Spider,” Expeditionary Learning (RI,</li> </ul>	<ul style="list-style-type: none"> <li>• “Dr. James Naismith, Inventor of Basketball,” <a href="http://www.kansasheritage.org/people/naismith.html">http://www.kansasheritage.org/people/naismith.html</a> (RI, 1290L)</li> <li>• “Airplane.” The New Book of Knowledge, Grolier Online, 2013. Web. Sept. 16, 2013 (excerpts) (RI, 1170L)</li> <li>• How Do Inventions Affect the Way We Live? Susan Quinn (RI, 1130L)</li> <li>• “First College Basketball Game,” <a href="http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_1.html">http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_1.html</a>, <a href="http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_2.htm">http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_2.htm</a></li> </ul>	<ul style="list-style-type: none"> <li>• “H.R. 4130: The Althea Gibson Excellence Act,” 112th Congress (RI, 1670L)</li> <li>• “The Great Roberto Clemente—Latino Legends in Sports,” Ozzie Gonzales (RI, 1240L)</li> <li>• “Sports in America,” abridged from U.S. State Department IIP publications (RI, 1190L)</li> <li>• H.R. 4130, United States Congress (RI, 1160L)</li> <li>• “Rules for Riding Desegregated Buses,” Dr. Martin Luther King Jr. (RI, 1160L)</li> <li>• “Notable Southerners: Althea Gibson,” as found at <a href="http://www.punctuationmadeeasy.com/files/Althea_Gibson">www.punctuationmadeeasy.com/files/Althea_Gibson</a></li> </ul>	<ul style="list-style-type: none"> <li>• <b><i>The Inuit Thought of It: Amazing Arctic Innovations (We Thought Of It)</i></b>, Alooook Ipellie and David MacDonald (RI, NL)</li> <li>• “Multibillion-dollar Iron Mine Approved for Baffin Island” excerpts CBC News Posted: Sep 15, 2012 (RI, 1410L)</li> <li>• “Deforestation in Canada” <a href="http://cfs.nrcan.gc.ca/papers/391">http://cfs.nrcan.gc.ca/papers/391</a> (RI, 1300L)</li> <li>• “Monitoring the Mary River Project” excerpt <a href="http://www.qia.ca/apps/authoring/dspPage.aspx?page=MRP-monitoring">http://www.qia.ca/apps/authoring/dspPage.aspx?page=MRP-monitoring</a> (RI, 1260L)</li> <li>• “Developing a Vital</li> </ul>	<ul style="list-style-type: none"> <li>• <b><i>Eight Days</i></b>, Edwidge Danticat (RL, 820L)</li> <li>• “Help for Haiti,” <i>Weekly Reader</i> (RI, NL)</li> <li>• “Haiti Earthquake Relief One-Year Report,” <a href="http://www.redcross.org/images/MEDIA_CustomProductCatalog/m3140113_HaitiEarthquake_OneYearReport.pdf">http://www.redcross.org/images/MEDIA_CustomProductCatalog/m3140113_HaitiEarthquake_OneYearReport.pdf</a> (RI, 1380L)</li> <li>• “American Red Cross Disaster Relief,” <a href="http://redcross.com">redcross.com</a> (RI, 1320L)</li> <li>• “Earthquakes,” <a href="http://scienceforkids.kidipedia.com">scienceforkids.kidipedia.com</a> (RI, 1240L)</li> <li>• “The Red Cross at a Glance,” Dave Coustan (RI,</li> </ul>



	<p>Ryall (RL, NL)</p> <ul style="list-style-type: none"> <li>• <b>The Universal Declaration of Human Rights</b> (RI, 1695L) (excerpts only)</li> <li>• “Background on the UDHR,” excerpted from <i>Human Rights: Here &amp; Now</i>, edited by Nancy Flowers (RI, 1690L)</li> <li>• The Universal Declaration</li> </ul>	<p>940L)</p> <ul style="list-style-type: none"> <li>• “Live Online Interview with Eve Nilson,” Scholastic (RI, 880L)</li> <li>• “I Want to Be a Rainforest Scientist,” poem (RL, 1100L)</li> <li>• “Facts about Howler Monkeys,” <i>National</i></li> </ul>	<p>ml, <a href="http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_3.html">http://www.americaslibrary.gov/jb/progress/jb_progress_basketball_3.html</a>. (RI, 1120L)</p> <ul style="list-style-type: none"> <li>• “How Did We Learn to Fly Like Birds?” <a href="http://www.grc.nasa.gov/WWW/k-12/UEET/StudentSite/historyofflight.html">http://www.grc.nasa.gov/WWW/k-12/UEET/StudentSite/historyofflight.html</a> (excerpts) (RI, 1120L)</li> <li>• “The Electric Motor,”</li> </ul>	<p>.doc (RI, 1130L)</p> <ul style="list-style-type: none"> <li>• <b><i>Promises to Keep: How Jackie Robinson Changed America</i></b>, Sharon Robinson (RI, 1030L)</li> <li>• “It’s Not Just a Game,” Lori Calabrese (RI, 1020L)</li> <li>• “Gibson, Althea (1927- 2003),” Reviewed by Frank</li> </ul>	<p>Resource for Canadians and the World” video transcript <a href="http://www.actionplan.ca/en/blog/r2ddr2/developing-vital-resource-canadians-and-world">http://www.actionplan.ca/en/blog/r2ddr2/developing-vital-resource-canadians-and-world</a> (RI, 1250L)</p> <ul style="list-style-type: none"> <li>• ”Products of Mining in</li> </ul>	<p>1200L)</p> <ul style="list-style-type: none"> <li>• “How Does a Hurricane Form?” <a href="http://scijinks.nasa.gov/hurricane">scijinks.nasa.gov/hurricane</a> (RI, 1140L)</li> <li>• Characteristics of Multinational Organizations, Matt Reher (RI, 1070L)</li> <li>• “How Do Hurricanes Form?” <a href="http://eo.ucar.edu/kids/dangerwx/hurricane3.htm">eo.ucar.edu/kids/dangerwx/hurricane3.htm</a> (RI,<sup>10</sup></li> </ul>
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<sup>10</sup> Texts listed in order of informational text first, then literature; both categories shown from most to least quantitatively complex (based on Lexile®).



	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
	<p>of Human Rights— Plain Language Version (RI, 1520L)</p> <ul style="list-style-type: none"> <li>• “A Short History of the UDHR,” adapted from <i>Human Rights Here &amp; Now</i>, edited by Nancy Flowers (RI, 930L)</li> <li>• “Teaching Nepalis to Read, Plant, and Vote,” Lesley Reed (RI, 930L)</li> <li>• “From Kosovo to the United States,” Isau Ajeti and Blanche Gosselin (RI, 560L)</li> <li>• <i>Esperanza Rising</i>, Pam Munoz Ryan (RL, 740L)</li> <li>• “Readers Theater Script: American Heroes” (RL, 660L)</li> </ul>	<p><i>Geographic</i> (RI, 910L)</p> <ul style="list-style-type: none"> <li>• “The Wings of the Butterfly: A Tale of the Amazon Rainforest,” Aaron Shepard (RL, 720L)</li> <li>• <i>Rainforest Research Journal</i>, Paul Mason (excerpts) (RI, NL; teacher copy only)</li> <li>• <i>Peterson First Field Guide to Birds of North America</i> (RI, NL)</li> </ul>	<p>Expeditionary Learning (RI, 1090L)</p> <ul style="list-style-type: none"> <li>• Inventing the Plane, Kate Reuther (RI, 1080L)</li> <li>• “Garrett Morgan: Inventor Hero,” Paula Morrow, in <i>Ask Magazine</i>, <a href="http://www.askmagkids.com/">http://www.askmagkids.com/</a> (RI, 1090L)</li> <li>• Inventing the Plane, Kate Reuther (RI, 1080L)</li> <li>• “Ingenious Inventions by Women: The Windshield Wiper and Paper Bag Machine,” Expeditionary Learning (RI, 1050L)</li> <li>• “Transportation, from the Soap Box Derby to the Jeep: First Automatic Traffic Signal,” from The Ohio Academy of Sciences, Heartland Science <a href="http://www.heartlandscience.org">www.heartlandscience.org</a> (RI, 1040L)</li> <li>• “Steve Jobs,” <i>Time for Kids</i> <a href="http://www.timeforkids.com/news/steve-jobs/21806">http://www.timeforkids.com/news/steve-jobs/21806</a> (excerpts) (RI, 1030L)</li> </ul>	<p>V. Phelps. The New Book of Knowledge. Grolier Online (RI, 1000L)</p> <ul style="list-style-type: none"> <li>• “Roberto Clemente,” Lynn C. Kronzek (RI, 990L)</li> <li>• “Roots of American Sports,” <i>Ally’s Multicultural History &amp; How It Relates to Us Today</i>. (RI, 940L)</li> <li>• “Courage on the Field,” Marc Stewart (RI, 930L)</li> <li>• “Roberto Clemente’s Gifts From the Heart,” Scholastic News (RI, 870L)</li> <li>• “The Great Migration,” <i>Junior Scholastic</i> (RI, 540L)</li> </ul>	<p>Canada: From Batteries to Vehicles” <a href="http://www.acareerinfo.ca/en/industry/everydayproducts.aspx">http://www.acareerinfo.ca/en/industry/everydayproducts.aspx</a> (RI, 1180L)</p> <ul style="list-style-type: none"> <li>• “Products” excerpts <a href="http://www.oilandgasinfo.ca/oil-gas-you/products/">http://www.oilandgasinfo.ca/oil-gas-you/products/</a> (RI, 1170L)</li> <li>• “Nunavut Braces for Massive Mary River Mine” CBC, September 13, 2012 (RI, 1120L)</li> <li>• “Natural Resources and the Canadian Economy” <a href="http://actionplan.gc.ca/en/page/r2d-dr2/overview">http://actionplan.gc.ca/en/page/r2d-dr2/overview</a> (RI, 1110L)</li> <li>• “Excerpts from the Qikiqtani Inuit Association Website” <a href="http://www.qia.ca/apps/authoring/dspPage.aspx?page=theproject">http://www.qia.ca/apps/authoring/dspPage.aspx?page=theproject</a> (RI, 1110L)</li> <li>• “Should We Drill?” Scholastic News Edition 5/6, April 26, 2010 (RI, 1070L)</li> <li>• “Nunavut”</li> </ul>	<p>1050L)</p> <ul style="list-style-type: none"> <li>• “Remarks by President Obama, Former President Bill Clinton, and Former President George W. Bush on the Recovery and Rebuilding Effort in Haiti” (RI, 1040L)</li> <li>• “Surface Amplified Haiti Earthquake,” <i>Weekly Reader</i> (RI, 910L)</li> <li>• “A Rocky Road Ahead,” <i>Scholastic News</i> (RI, 820L)</li> <li>• Earthquake.” The New Book of Knowledge. Grolier Online (RI, 770L)</li> <li>• “On Shaky Ground,” Scholastic Inc. (RI, 760L)</li> </ul>



• “The Twofold Genius of Garrett Morgan,” from Social Studies for Kids, <http://www.socialstudiesforkids.com/articles/us-history/garrettmorgan.htm>. (RI, 950L)

excerpts Bone, R. M. "Nunavut." The New Book of Knowledge. Grolier Online, 2013. Web. 11 Sept. 2013 (RI, 970L)



	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
			<ul style="list-style-type: none"> <li>• “Big Thinkers: Was Steve Jobs this Generation’s Thomas Edison?” Junior Scholastic. 11/21/2011, Vol. 114 Issue 6, p5-5. 1p (RI, 940L)</li> <li>• Garrett Augustus Morgan, Expeditionary Learning (RI, 930L)</li> <li>• “Invention of the Airplane,” Shashank Nakate, <a href="http://www.buzzle.com/articles/invention-of-the-airplane.html">http://www.buzzle.com/articles/invention-of-the-airplane.html</a> (excerpts) (RI, 920L)</li> <li>• <b><i>The Boy Who Invented TV: The Story of Philo Farnsworth</i></b>, Kathleen Krull (RI, 860L)</li> <li>• “The TV Guy,” <a href="http://www.ilovehistory.gov/people/difference/farnsworth.html">http://www.ilovehistory.gov/people/difference/farnsworth.html</a> (RI, 850L)</li> <li>• <b><i>Investigating the Scientific Method with Max Axiom, Super Scientist</i></b>, Donald B. Lemke</li> </ul>		<ul style="list-style-type: none"> <li>• “Minerals and Metals in Your Life” excerpts PDAC Mining Matters News September 2004 – Issue 4 (RI, 940L)</li> <li>• “A Limited Supply” <a href="http://www.ecokids.ca/pub/eco_info/topics/canada_north/nature/resources.cfm">http://www.ecokids.ca/pub/eco_info/topics/canada_north/nature/resources.cfm</a> (RI, 910L)</li> </ul>	



			<p>(RI, 760L)</p> <ul style="list-style-type: none"><li>• “Television Takes the World by Storm” (video excerpts), <a href="http://www.history.com/s_hows/modern-marvels/videos/television-takes-the-world-by-">http://www.history.com/s_hows/modern-marvels/videos/television-takes-the-world-by-</a></li></ul>			
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	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
			storm#television-takes-the-world-by-storm (RI, NL)			
<b>Lexile®</b>	Common Core Band Level Text Difficulty Ranges for Grades 4–54: 740–1010L					
<b>Performance Task</b>	Readers Theater Script and Performance of Scenes from <i>Esperanza Rising</i> (W.5.3, W.5.4, W.5.5, W.5.9, W.5.10, W.5.11, and SL.5.6) scaffolded script writing and dramatic presentation	Research-Based Narrative Writing: Rainforest Field Journal Page (RI.5.7, RI.5.9, W.5.2, W.5.3, W.5.4, W.5.5, W.5.7, W.5.8, and W.5.9) scaffolded narrative and explanatory essay	Graphic Style Novelette (RI.5.9, W.5.2, W.5.3, W.5.4, W.5.5, W.5.6, W.5.7, W.5.8, L.5.1c, L.5.3, and L.5.4) scaffolded research-based graphic novel	Letter to a Publisher (RI.5.9, W.5.1, W.5.4, W.5.5, W.5.7, W.5.8, W.5.9b, L.5.1, L.5.2a-c and L.5.6) scaffolded opinion essay	Editorial Essay (W.5.1, W.5.4a, W.5.5, W.5.8, W.5.9b, L.5.1c, d, L.5.2a, b, d, e, SL.5.1, and SL.5.3) scaffolded opinion essay	Opinion Speech: How Should U.S. Humanitarian Organizations Prioritize Aid to Neighboring Countries Following a Natural Disaster? (RI.5.7, RI.5.9, W.5.1, W.5.4, W.5.5, W.5.7, W.5.8, W.5.9, W.5.11, L.5.1, L.5.2, L.5.3a, L.5.6, SL.5.4, SL.5.5, and SL.5.6) scaffolded essay and speech <sup>11</sup>

<sup>11</sup> Supplemental Information for Appendix A of the Common Core State Standards for English Language Arts and Literacy: New Research on Text Complexity  
[http://www.corestandards.org/assets/E0813\\_Appendix\\_A\\_New\\_Research\\_on\\_Text\\_Complexity.pdf](http://www.corestandards.org/assets/E0813_Appendix_A_New_Research_on_Text_Complexity.pdf)



**Figure 4.7: Unit-Level Assessments (ELA CCSS)**

	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
<b>Mid-Unit 1</b>	Human Rights Vocabulary and Common Prefixes (L.5.6 and W.5.10) selected response and short constructed response	Analyzing an Interview with a Rainforest Scientist Part 1 (RI.5.1, RI.5.2, RI.5.3 and L.5.4) selected response and short constructed response	Text Dependent Questions: <i>Investigating the Scientific Method with Max Axiom Super Scientist</i> , pages 24– 27 (RL.5.7, W.5.9, and L.5.4) selected response and short constructed response	Identifying Author’s Opinion and Supporting Evidence: Sports in American Culture (RI.5.2, RI.5.4, and RI.5.8) selected response and short constructed response	Text-Dependent and Short Answer Questions: “Arctic Fun” (RI.5.1, RI.5.2, RI.5.4, and L.5.5c) short constructed response	Text-Dependent Short- Answer Quiz—the Effects of Natural Disasters (RI.5.1, RI.5.3 and RI.5.4) selected response and short constructed response
<b>End of Unit 1</b>	On-Demand Analysis of a Human Rights Account (RI.5.1, RI.5.2, RI.5.3, RI.5.9, and W.5.9) selected response and extended response	Analyzing an Interview with a Rainforest Scientist Part 2, and Comparing and Contrasting Texts about Rainforest Biodiversity (RI.5.1, RI.5.2, RI.5.4, RI.5.5, RI.5.9, and W.5.1a, b) selected response, short constructed response, and speaking and listening	Using Quotes to Explain Relationships and Support an Opinion (RI.5.1, RI.5.3, RI.5.4, RI.5.5, and W.5.1a and b) selected response, short constructed response, and short opinion essay	On-Demand Opinion and Evidence Paragraph about the Importance of Sports in American Culture (W.5.1 and W.5.9) short constructed response	On-Demand Note Taking and Summarizing: “The Inuit Today” (RI.5.1, RI.5.2, RI.5.3, RI.5.4, and L.5.5c) on-demand note taking	Part I, On-Demand Essay: “What Makes a Hurricane a Natural Disaster?” (W.5.2, W.5.4, W.5.9b); Part II, Science Talk (SL.5.1a, b, c, d, e and f) extended response and speaking and listening



<p><b>Mid-Unit 2</b></p>	<p>Analyzing Sections of <i>Esperanza Rising</i> on My Own (RL.5.1, RL.5.3, RL.5.2, and RL.5.4) selected response and short constructed response</p>	<p><i>The Most Beautiful Roof in the World</i> Quiz (RI.5.1, RI.5.2, RI.5.4, and L.5.4a and b) selected response and short constructed response</p>	<p>Text-Dependent Questions: “The TV Guy” (RI.5.1, RI.5.2, RI.5.4, and L.5.4) selected response and short constructed response</p>	<p>Identifying Author’s Opinion, Reasons, and Supporting Evidence: “Courage on the Field” (RI.5.2, RI.5.4, RI.5.6 and RI.5.8) selected response and short constructed response</p>	<p>Text-Dependent and Short Answer Questions: Excerpts from “A Limited Supply” (RI.5.1, L.5.4 (a, c), and L.5.5c) short constructed response</p>	<p>Text-Dependent Questions, <i>Dark Water Rising</i> Chapter 13 (RL.5.6, RL.5.7, and L.5.5a, b, c) selected response and short constructed response</p>
<p><b>End of Unit 2</b></p>	<p>On-Demand Analytical Essay about How <i>Esperanza</i> Changes Over Time</p>	<p>On-Demand Analysis of Meg Lowman’s Research in the Rainforest (W.5.2a, b, d, e, W.5.4,</p>	<p>On-Demand Informational Writing: Philo Farnsworth’s Invention of</p>	<p>Writing an Opinion Essay with Supporting Evidence about Jackie Robinson’s Legacy</p>	<p>Research and Response (RI.5.1, RI.5.3, RI.5.9, W.5.7, W.5.8, SL.5.1 and SL.5.2) research and</p>	<p>On-Demand Analysis of How Different Narrators Describe Similar Events (RL.5.9, W.5.2, W.5.4 and</p>

	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
	(RL.5.1, RL.5.2, RL.5.3, W.5.2, W.5.4, W.5.5, and W.5.9a) extended response	W.5.8 and W.5.9b) extended response	the Television and How It Changed People’s Lives (RL.5.3, W.5.2, and L.5.4) on-demand essay	(W.5.1, W.5.4 and W.5.9) extended response	speaking and listening response	W.5.9a) extended response
<b>Mid-Unit 3</b>	Evaluating a Novel versus a Script (RL.5.1, RL.5.4, RL.5.5, RL.5.6, and RL.5.9) short constructed response	On-Demand Note-Taking about Howler Monkeys (RI.5.1, RI.5.2, RI.5.7, W.5.8, and W.5.9b) short constructed response	On-Demand Note Taking and Text-Dependent Questions: “Garrett Augustus Morgan” or “How Did We Learn to Fly?” (RI.5.1, RI.5.4, RI.5.7, W.5.7 and W.5.8) selected response and short constructed response	Notes and Graphic Organizer for a Letter to a Publisher (RI.5.9, W.5.1, W.5.7, and L.5.6) short constructed response	On-Demand Note-Taking, Analysis, and Reflection: “Should We Drill?” (RI.5.1, RI.5.6, RI.5.8, W.5.8, W.5.9b, and L.5.4a) note taking	Short Constructed Response and Organizing Notes for a Public Speech (RI.5.7, W.5.7, W.5.8, and W.5.9b) short constructed response
<b>End of Unit 3</b>	Individual Scene of a Readers Theater Script (W.5.3, W.5.4, and W.5.9) extended response	Writing a Rainforest Field Journal Entry about Howler Monkeys (RI.5.7, W.5.2a, b, c, d, W.5.3, W.5.4, W.5.7, and W.5.9b) extended response	Text-Dependent Questions about “You Can Do a Graphic Novel” excerpt and Storyboard Draft (RI.5.1, RI.5.4, RI.5.9, W.5.2, W.5.3a and b, W.5.4, and W.5.8) selected response, short constructed response, and notes	Draft Letter to a Publisher (RI.5.9, W.5.1, W.5.4, L.5.1c, d) extended response	Text-Dependent Questions and Draft Editorial: The Mary River Project on Baffin Island (RI.5.1, W.5.1, W.5.8, W.5.9b, and L.5.4a) short response and scaffolded essay	On-demand Draft Opinion Speech: How Should U.S. Humanitarian Organizations Prioritize Aid to Neighboring Countries Following a Natural Disaster? (RI.5.9, W.5.1, W.5.4, W.5.5, W.5.7, W.5.8, W.5.9 and L.5.2) extended response

	Module 1	Module 2A	Module 2B	Module 3A	Module 3B	Module 4
ideas, cultural perspectives, eras, personal events, and situations. <sup>12</sup>	Grades 3–5: Sample Plan” (stand-alone document on EngageNY.org).					
A. Self-select texts to develop personal preferences regarding favorite authors.	Integrated throughout.					
B. Use established criteria to categorize, select texts and assess to make informed judgments about the quality of the piece.	Implemented through Accountable Independent Reading: see “Launching Independent Reading in Grades 3–5: Sample Plan” (stand-alone document on EngageNY.org).					

Figure 4.8 contains the EngageNY Curricular Map for the grades 6<sup>th</sup>-8<sup>th</sup>.

Figure 4.8: Grades 6-8 Curricular Plan

		Module 1: Close Reading and Writing to Learn	Module 2A: Working with Evidence	Module 3A: Understanding Perspectives	Module 4: Research, Decision Making, and Forming Positions
GRADE 6	Topic	Myths: Not Just Long Ago	Rules to Live By	The Land of the Golden Mountain	Insecticides: Costs vs. Benefits
	Central Texts*	RL— <i>The Lightning Thief</i> , Rick Riordan	RL— <i>Bud, Not Buddy</i> , Christopher Paul Curtis RI—“Stanford University Commencement Address,” Steve Jobs	RL— <i>Dragonwings</i> , Laurence Yep RI—“Comprehending the Calamity,” Emma M. Burke	RL— <i>Frightful’s Mountain</i> , Jean Craighead George RI—“The Exterminator,” Kristen Weir
	Writing Tasks**	<ul style="list-style-type: none"> <li>Literary Analysis—Connecting Themes in Cronus and <i>The Lightning Thief</i> (RL.6.2, W.6.2, 6.9)</li> <li>My Hero’s Journey Narrative (RL.6.3, W.6.3)</li> </ul>	<ul style="list-style-type: none"> <li>Argument: How Does Bud Use His Rules—to Survive or to Thrive? (RL.6.3, W.6.1, 6.9)</li> <li>Research/Inform: “My Rule to Live By” (RL.6.3, W.6.2)</li> </ul>	<ul style="list-style-type: none"> <li>Literary Analysis: How Do the Author’s Purposes Affect the Narrator’s Points of View? (W.6.2, 6.9)</li> <li>Newspaper Article: How the 1906 San Francisco Earthquake and Fire Affected the People of San Francisco (W.6.2, 6.7)</li> </ul>	<ul style="list-style-type: none"> <li>Research Simulation (W.6.7, 6.8, 6.9)</li> <li>Position Paper: Do the Benefits of DDT Outweigh Its Harmful Consequences? (W.6.1, 6.9)</li> </ul>
GRADE 7	Topic	Journeys and Survival	Working Conditions	Slavery: The People Could Fly	Screen Time and the Developing Brain
	Central Texts*	RL— <i>A Long Walk to Water</i> , Linda Sue Park RI—“Sudanese Tribes Confront Modern War,” Karl Vick	RL— <i>Lyddie</i> , Katherine Patterson RI—“Commonwealth Club Address,” César Chávez	RI— <i>Narrative of the Life of Frederick Douglass</i> (excerpts)	No text purchase required; students will read articles only about the adolescent brain and the effects of technology use, provided in lesson supporting materials.
	Writing Tasks**	<ul style="list-style-type: none"> <li>Literary Analysis: Writing about the Theme of Survival (RL.7.1, 7.2, W.7.2, 7.9)</li> <li>Research-based Two-Voice Poem (RL.7.6, W.7.3, 7.9)</li> </ul>	<ul style="list-style-type: none"> <li>Argument: Should Lyddie Sign the Petition? (RL.7.3, W.7.1)</li> <li>Consumer’s Guide to Working Conditions in the Garment Industry (W.7.2, 7.6, 7.7)</li> </ul>	<ul style="list-style-type: none"> <li>Literary Nonfiction Analysis: Analyzing Douglass’s Position in the <i>Narrative</i> (RI.7.2, 7.6, W.7.2, 7.9)</li> <li>Children’s Book to Retell an Episode from the <i>Narrative</i> (W.7.3, 7.9)</li> </ul>	<ul style="list-style-type: none"> <li>Research Simulation (W.7.7, 7.8, 7.9)</li> <li>Position Paper: Should the American Academy of Pediatrics raise its recommended daily entertainment screen time from two hours to four hours? (RI.7.1, W.7.1, 7.4, and 7.5)</li> </ul>

<sup>12</sup> This is a standard specific to New York State. In the elementary modules, RL.11a and b are also addressed through Accountable Independent Reading. See “Foundational Reading and Language Skills: Resource Package for Grades 3-5” (in Resources on [commoncoresuccess.elschools.org](http://commoncoresuccess.elschools.org)). On this document, look specifically at the section titled “Independent Reading: The Importance of a Volume of Reading and Sample Plans.”

<b>GRADE 8</b>	<b>Topic</b>	<b>Finding Home: Refugees</b>	<b>Working with Evidence: Taking a Stand</b>	<b>Japanese American Relations in WWII</b>	<b>Sustainability of World's Food Supply</b>
	<b>Central Texts*</b>	RL – <i>Inside Out &amp; Back Again</i> , Thanhha Lai* RI—“The Vietnam Wars,” Tod Olson	RL— <i>To Kill a Mockingbird</i> , Harper Lee RI— “Equal Rights for Women,” Chisholm RI— “Ain’t I a Woman?” Sojourner Truth	RI— <i>Unbroken: A World War II Story of Survival, Resilience, and Redemption</i> , Laura Hillenbrand	RI— <i>The Omnivore’s Dilemma: The Secrets Behind What You Eat</i> , Michael Pollan (Young Readers’ Edition)
	<b>Writing Tasks**</b>	<ul style="list-style-type: none"> <li>Literary Analysis: Explain the Significance of the Novel’s Title (RL.8.1, 8.3, RI.8.1, W.8.2, 8.9)</li> <li>Research-based Free Verse Narrative Poems: “Inside Out” and “Back Again” (RL.8.1, 8.2, W.8.3, 8.9)</li> </ul>	<ul style="list-style-type: none"> <li>Argument: Taking a Stand (RL.8.1, 8.2, 8.3, W.8.1)</li> <li>Readers Theater and Analytical Commentary: Taking a Stand in <i>Maycomb</i> (RL.8.11, W.8.3, 8.11)</li> </ul>	<ul style="list-style-type: none"> <li>Informational Essay: Invisibility of Captives during WWII (RI.8.1, W.8.2, 8.9)</li> <li>Research-based Narrative: Becoming Visible after Internment (RI.8.1, W.8.3)</li> </ul>	<ul style="list-style-type: none"> <li>Research Simulation (W.8.7, 8.8, 8.9)</li> <li>Position Paper: Which of Michael Pollan’s Four Food Chains Would Best Feed the United States? (W.8.1, 8.9)<sup>13</sup></li> </ul>

		<b>Module 2B: Working with Evidence</b>	<b>Module 3B: Understanding Perspectives</b>	<b>Module 4B: Research, Decision Making, and Forming Positions</b>
<b>GRADE 6</b>	<b>Topic</b>	<b>Voices of Adversity</b>	<b>Sustaining the Oceans</b>	<b>N/A</b>
	<b>Central Texts*</b>	RL - <i>Good Masters! Sweet Ladies! Voices from a Medieval Village</i> , Laura Amy Schlitz RL - <i>Blue Lipstick: Concrete Poems</i> , John Grandits RL - <i>Technically, It’s Not My Fault: Concrete Poems</i> , John Grandits	RI - <i>World Without Fish</i> , Mark Kurlansky RL - <i>Flush</i> , Carl Hiassen	GRADE 7 ONLY
	<b>Writing Tasks**</b>	<ul style="list-style-type: none"> <li>Argument Essay: Do We Face the Same Adversities as the Voices of <i>Good Masters, Sweet Ladies?</i> (W.6.1 and 6.9)</li> <li>Narrative: Giving Voice to Adversity (W.6.3, 6.11c, SL.6.4 and 6.6)</li> </ul>	<ul style="list-style-type: none"> <li>Research (W.6.7)</li> <li>Informational Consumer Guide (W.6.2)</li> </ul>	GRADE 7 ONLY
<b>GRADE 7</b>	<b>Topic</b>	<b>Identify and Transformation: Then and Now</b>	<b>N/A</b>	<b>Water is Life</b>
	<b>Central Texts*</b>	RL - <i>Pygmalion</i> , George Bernard Shaw RI – Various informational articles about identify	Please note that, for 7th grade, alternate modules will be available for Modules 2 and 4, rather than for Modules 2 and 3.	RI— <i>The Big Thirst</i> , Charles Fishman RI—“Water Is Life,” Barbara Kingsolver
	<b>Writing Tasks**</b>	<ul style="list-style-type: none"> <li>Argument Essay: Eliza’s Changes (RL.7.1, 7.3, and W.7.1)</li> <li>Advertisement Analysis and “Counter-Ad” (W.7.2a, b, c, d, e, f, 7.7, and 7.8)</li> </ul>		<ul style="list-style-type: none"> <li>Research Simulation (W.7.7, 7.8, 7.9)</li> <li>Water Management Position Paper:(RI.7.1, W.7.1, 7.4, 7.5, and L.7.6)</li> </ul>
<b>GRADE 8</b>	<b>Topic</b>	<b>A Midsummer Night’s Dream and the Comedy of Control</b>	<b>The Civil Rights Movement and the Little Rock Nine</b>	<b>N/A</b>
	<b>Central Texts*</b>	RL - <i>A Midsummer Night’s Dream</i> , William Shakespeare RI – Various informational articles about Shakespeare and the universal appeal of his works	RI - <i>A Mighty Long Way: My Journey to Justice at Little Rock Central High School</i> , Carlotta Walls LaNier and Lisa Frazier Page RI - <i>Little Rock Girl 1957: How a Photograph Changed the Fight for Integration</i> , Shelley Tougas	GRADE 7 ONLY

\* 13 This plan shows most full-length books all students read, and a few key articles. See separate document “Trade Books and Other Resources” for a complete list of resources needed in order to implement the modules.

\*\* This plan shows the two main writing tasks per module and the standards most central to each task. See Curriculum Map for the full list of standards assessed (including the writing process and language standards). For seventh grade specifically, two options for Module 4 will be available: 7M4A: (topic TBD) and 7M4B: “Water Is Life”.

<b>Writing Tasks**</b>	<ul style="list-style-type: none"> <li>• Argument Essay: Controlling Others in <i>A Midsummer Night's Dream</i> (W.8.1)</li> <li>• Character Confessional Narrative (RL.8.2, 8.3, W.8.3, 8.4, 8.9a, and 8.11b)</li> </ul>	<ul style="list-style-type: none"> <li>• Informational Essay: The Role of the Media in the Story of the Little Rock Nine (W.8.2)</li> <li>• Narrative Writing: "Snapshot in a Journey" (W.8.3)</li> </ul>	GRADE 7 ONLY <sup>14</sup>
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\* <sup>14</sup> This plan shows most full-length books students read, and a few key articles. See separate document "Trade Books and Other Resources" for a complete list of resources needed in order to implement the modules.

\*\* This plan shows the two main writing tasks per module and the standards most central to each task. See Curriculum Map for the full list of standards assessed (including the writing process and language standards) For seventh grade specifically, two options for Module 4 will be available: 7M4A: (topic TBD) and 7M4B: "Water Is Life".

**Writing.** In the Vanguard Collegiate Writing course, scholars develop strong academic writing skills in both academic paragraphs and formal essays. Scholars write at least one process-based essay per unit and complete at least two on-demand writing assessments. Students type process-based essays on the computer using Google Docs and work to develop the digital literacy skills needed for success in competitive high schools and colleges such as argumentative, informative, and narrative writing. Each year, students gain exposure to a variety of genres, question types, standards, and writing styles. All formal essays are graded on a rubric that prioritizes argument, evidence, and language, and breaks each category into strands and criteria so teachers can track and use data efficiently in writing class, and students have a clear sense of which writing skills students have mastered and which they need support with. Within the argument element, there are three strands: organization, ideas, and position. Within position, students are graded on thesis and assertions. Within ideas, students are graded on the quality of their ideas; within organization, students are graded on the structure of their essay. Within the evidence element, students are graded on selection of evidence and interpretation/analysis of that evidence. Within the language element, students are graded accuracy and clarity (conventions, register).

**Figure 4.9: Writing End of Year Thresholds by Grade Level**

5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade
Writing Rubric Scores of 4 on argument, 4 on evidence, 2 on language	Writing Rubric Scores of 5 on argument, 5 on evidence, 3 on language	Writing Rubric Scores of 6 on argument, 6 on evidence, 3 on language	Writing Rubric Scores of 7 on argument, 7 on evidence, 4 on language

Detailed descriptions for the score on each criteria of the rubric are below in **Figure 4.10**.

**Figure 4.10: Writing Rubric<sup>15</sup>**

Element	Strand	Criteria	1	2	3	4	5	6	7	8	
Argument	Position	Thesis	Topic sentence partially addresses the prompt and may misinterpret some of the prompt or present supfluous claims. Topic sentence is an opinion, stated in the 1st person.	Clear and focused topic sentence generally addresses the prompt and purpose. The topic sentence states a relevant claim in the third person.	This thesis statement largely attempts to address all the parts of the prompt, but may lack clarity or specificity and/or may parrot the prompt.	5th and 6th Grade: Clear, defensible thesis statement addresses all the parts of the prompt. The thesis states a claim in third person. May list assertions in the thesis statement.	Clear, defensible, comprehensive thesis statement addresses all the parts of the prompt. The thesis states a claim in third person. May list assertions in the thesis statement.	7th Grade: Clear, defensible, comprehensive, and focused thesis statement addresses all parts of the prompt. The thesis states a claim in the third person. May list assertions in the thesis statement.	8th Grade: Clear, defensible, comprehensive, focused, and analytical thesis statement completely addresses the prompt. The thesis states a claim in the third person.	Clear, defensible, comprehensive, focused, analytical, and nuanced thesis statement completely addresses the prompt. The thesis states a claim in the third person.	
		Assertions	Generally body paragraphs contain topic sentences that frame each paragraph. Some topic sentences are related to the topic of the paper.	Most topic sentences are relevant to the topic of the paper.	All topic sentences are directly relevant to the topic of the paper.	Each topic sentence is directly relevant to the thesis statement and some topic sentences are assertions. Sequence of assertions may be random.	Each topic sentence is directly relevant to the thesis and most topic sentences are assertions. Sequence of assertions is attempted.	Each topic sentence is an assertion that supports the thesis statement. ☐ ☐ ☐ Sequence of assertions is mostly intentional but may not effectively advance the argument.	Each assertion provides defensible and relevant support for the larger argument of the thesis statement. ☐ ☐ ☐ Sequence of assertions is intentional and sometimes advances the argument.	Each assertion provides defensible and relevant support for the larger argument of the thesis statement. ☐ ☐ ☐ Sequence of assertions is intentional and mostly advances the argument.	
	Ideas	Quality	Ideas show some understanding of the text/content and the task; includes a significant misunderstanding.	Ideas show some understanding of the text/content and the task.	Generally, ideas show basic, literal understanding of the text/content and the task.	Mostly, ideas show basic, literal understanding of the text/content and task.	Almost all ideas show basic literal understanding of the text/content and the task. Some ideas show critical thinking. Acknowledges alternate or opposing claim.	Almost all ideas show basic literal understanding of the text/content and the task. Some ideas show critical thinking. Acknowledges alternate or opposing claim.	Almost all ideas show basic, literal understanding of the text/content and the task. ☐ ☐ ☐ Generally ideas show critical thinking. Anticipates counterclaims, distinguishes them from claims, and provides rebuttals to counterclaims.	Generally, ideas reveal depth of understanding of the text/content and the task. ☐ ☐ ☐ Most ideas show critical thinking. Anticipates counterclaims, distinguishes them from claims, and provides rebuttals to counterclaims.	Generally, almost all ideas reveal depth of understanding of the text/content and the task. ☐ ☐ ☐ Complex ideas are introduced. Anticipates and provides logical explanations or refutations to counterarguments, after developing them fairly.
		Structure	Paragraphs are absent yet ideas and information relate to each other.	Groups related ideas and information logically. May provide a concluding statement or section that connects to the topic.	Groups related ideas and information logically. Organizes ideas into separate and distinct body paragraphs. Provides a concluding statement or section that connects to the topic.	Organizes ideas into separate and distinct body paragraphs. ☐ ☐ Content of paragraphs is generally appropriate. ☐ ☐ Concluding statement or section links to introduction.	Reasonable essay structure. ☐ ☐ Content of paragraphs is mostly appropriate. ☐ ☐ Concluding section links to thesis.	Reasonable essay structure. Body paragraphs include appropriate content in a logical internal structure. Introduction and conclusion are appropriately structured and conclusion supports thesis.	Well-developed essay has logical internal structure, building to become more convincing and complete. Introduction is sophisticated and the conclusion provides closure.	Well-developed essay has logical internal structure to enhance the understanding of the reader, building to become more convincing and complete. Sophisticated introduction draws readers in and insightful conclusion provides closure and eclipses thesis.	

<sup>15</sup> <https://www.engageny.org/resource/new-york-state-english-a-second-language-achievement-test-nyseslat-rubrics>

Element	Strand	Criteria	1	2	3	4	5	6	7	8	
Evidence	Selection	Choice	Some evidence selected is connected to the main idea of the paper.	Most evidence selected is connected to the main idea of the paper.	Most evidence selected is connected to the topic of the paragraph.	All evidence selected is connected to the topic of the paragraph.	Almost all evidence selected is connected to assertion, although some may not be directly relevant.	evidence is adequate in amount and when applicable, drawn from multiple sources.	Almost all evidence selected is directly relevant to assertion; Some evidence strongly supports assertion; attempts to create a progression of evidence.	Almost all evidence selected strongly supports assertion, generally creating a purposeful progression of evidence; evidence is adequate in amount and drawn from multiple sources and parts of the text(s).	Almost all evidence selected strongly and accurately supports assertion and creates a purposeful progression of evidence. evidence is appropriate in amount and drawn from multiple sources and varied parts of the text(s). Successfully persuades audience through incorporating multiple rhetorical appeals.
		Analysis	Attempts to clarify or explain one piece of evidence. May restate the evidence.	Clarifies and explains the meaning of some evidence as needed.	Clarifies and explains the meaning of most evidence as needed.	Almost all evidence is clarified or explained as needed. Accurately relates at least one piece of evidence back to the assertion although additional analysis may be inaccurate or implausible.	Almost all evidence is clarified or explained as needed. Some evidence is analyzed. Analysis is mostly plausible.	Most evidence is analyzed and connected to the assertion; analysis is generally logical and accurate;	Most evidence is analyzed and connected to the assertion; analysis is generally focused, logical, and accurate; some rough use of word glue (i.e. repeated words) and some rough use of logic glue (i.e. transitions)	Some evidence displays thoughtful analysis; analysis is generally focused, logical, and accurate; roughly incorporates key words from evidence into analysis generally effective use of word glue and some rough use of logic glue. Implicit or explicit link enhances efficiency and momentum of the argument.	

Element	Strand	Criteria	1	2	3	4
Language	Clarity	Sentence Fluency	Mostly free of obvious fragments and run-ons.	Almost all sentences are complete.	Almost all sentences are complete and clear; writing is largely free of extraneous expressions.	Writes mostly in an active voice with complete, clear, and varied sentences. Writing is generally free of unnecessary repetition.
		Word Choice	Limited or vague word choice with little to no content vocabulary.	Attempts to incorporate academic and/or content vocabulary.	Varied academic and content vocabulary is used accurately.	Broad range of varied, energizing and powerful academic and content vocabulary; natural, effective expression.
	Correctness	Register	Attempts to incorporate a formal tone.	Attempts to maintain a formal tone; limited use of 1st and 2nd person.	Consistently writes in 3rd person plural; any lapse in distance does not hinder formality.	Consistently writes with an appropriate distance and appropriate verb tense; minimal use of colloquialisms and contractions.
		Conventions	Numerous errors in grammar and spelling hinder comprehension.	Grammar and spelling minimally hinder readability.	Correct use of grammar and spelling allow for smooth reading.	Strong command of grammar and spelling contributes to reading.

Each day in Writing class, students follow a similar agenda to Reading, with the majority of class time spent writing, editing, or revising process-based essays, as outlined in **Figure 4.11**. Students receive feedback on their work during and after class. **Figure 4.12** outlines writing units and related rubric.

**Figure 4.11: Writing Lesson Daily Agenda**

Element	Time	Description
Do Now	7 min	Based on trends from the prior day's Student Work Analysis, the teacher highlights a common misconception, addresses errors in student work, or engages students in inquiry-based discovery through mentor text analysis.

Frame	3 min	Teacher briefly introduces the aim for the day, provides clear criteria for success, and a model.
Time in Ink	35 min	Students spend the bulk of the time during class in accountable independent writing, either individually, with partners, or in a small group. The teacher actively circulates the room to give feedback on adherence to the criteria for success, rubric-aligned individual goals, pacing, and stamina. The teacher pauses the class 1-3 times to provide batch feedback or address a misconception.
Exit Ticket	5 min	Students highlight the work that they did for the day in their Google doc so the teacher can easily provide feedback.

**Figure 4.12: Writing Units and Rubric Foci by Grade Level**

<b>5<sup>th</sup> Grade Writing Genres and Rubric Foci</b>				
<b>Unit</b>	<b># Days</b>	<b>Primary Genres</b>	<b>Rubric Criteria Focus</b>	<b>Rubric Review Focus</b>
Unit 1	29	Academic Paragraphs Literary Analysis (character change)	Structure (3) Thesis (2) Assertions (2) Sentence Fluency (2)	
Unit 2	22	Academic Paragraphs Informational Paragraphs Literary Analysis (character development)	Evidence Selection (2) Evidence Analysis (2) Ideas (2) Register (2)	Structure Thesis Assertions Sentence Fluency
Unit 3	29	Literary Analysis (theme development)	Thesis (3) Assertions (3) Evidence Selection (3) Conventions (2)	Based on data
Unit 4	24	Informational Paragraphs Informative Research Paper	Evidence Analysis (3) Ideas (3) Word Choice (2)	Based on data
Unit 5	36	On Demand Writing Unit	Mixed Review	Mixed Review
Unit 6	23	Informative Research Paper Narrative Writing	Thesis (4) Structure (4) Evidence Selection (4) Conventions (2)	Based on data
<b>6<sup>th</sup> Grade Writing Genres and Rubric Foci</b>				
<b>Unit</b>	<b># Days</b>	<b>Primary Genres</b>	<b>Rubric Criteria Focus</b>	<b>Rubric Review Focus</b>
Unit 1	29	Academic Paragraphs Literary Analysis Essay (character development)	Structure (4) Thesis (4) Assertions (3) Sentence Fluency (3)	
Unit 2	22	Academic Paragraphs Argumentative Essay	Evidence Selection (4) Evidence Analysis (3) Ideas (3) Register (3)	Structure Thesis Assertions Sentence Fluency
Unit 3	29	Compare & Contrast Essay (craft in poetry vs. nonfiction)	Thesis (4) Assertions (4) Evidence Selection (5) Conventions (3)	Based on data
Unit 4	24	Argumentative Essay Literary Analysis Essay	Evidence Analysis (4) Ideas (4) Word Choice (3)	Based on data
Unit 5	36	On Demand Writing Unit	Mixed Review	Mixed Review

Unit 6	23	Independent Research	Assertions (5) Structure (5) Evidence Selection (5) Conventions (3)	Based on data
7 <sup>th</sup> Grade Writing Genres and Rubric Foci				
Unit	# Days	Primary Genres	Rubric Criteria Focus	Rubric Review Focus
Unit 1	29	Nonfiction Analysis	Structure (6) Thesis (5) Assertions (5) Sentence Fluency (4)	
Unit 2	22	Compare and Contrast Essay Writing	Evidence Selection (5) Evidence Analysis (4) Ideas (5) Register (3)	Structure Thesis Assertions Sentence Fluency
Unit 3	29	Rhetorical Analysis	Thesis (6) Assertions (6) Evidence Selection (6) Conventions (3)	Based on data
Unit 4	24	Argumentative Essay	Evidence Analysis (5) Ideas (6) Word Choice (3)	Based on data
Unit 5	36	On Demand Writing Unit	Mixed Review	Mixed Review
Unit 6	23	Independent Research and Writing	Ideas (6) Evidence Analysis (6) Evidence Selection (6)	Based on data
8 <sup>th</sup> Grade Writing Genres and Rubric Foci				
Unit	# Days	Primary Genres	Rubric Criteria Focus	Rubric Review Focus
Unit 1	29	Literary Analysis	Structure (6) Thesis (6) Assertions (6) Sentence Fluency (4)	
Unit 2	22	Argumentative Essay	Evidence Selection (6) Evidence Analysis (6) Ideas (6) Register (4)	Structure Thesis Assertions Sentence Fluency
Unit 3	29	Argumentative Essay	Thesis (7) Assertions (7) Evidence Selection (7) Conventions (4)	Based on data
Unit 4	24	Argumentative Essay	Evidence Analysis (7) Ideas (7) Word Choice (4)	Based on data
Unit 5	36	On Demand Writing Unit	Mixed Review	Mixed Review
Unit 6	23	Independent Research and Writing	Ideas (7) Evidence Analysis (7) Evidence Selection (7)	Based on data

**Mathematics.** The purpose of Mathematics at Vanguard Collegiate is to prepare all students for mastery of grade level standards. As such, each year-long mathematics course is standards-driven, data-based, and uses a combination of well-vetted materials from organizations with proven results in addition to the EngageNY curriculum. The goal and expectation is for all scholars to master their respective grade level Indiana Academic

Standards. **Figure 4.13** contains a sample agenda for math courses at Vanguard Collegiate.

**Figure 4.13: Mathematics Lesson Daily Agenda**

Element	Time	Description
Do Now	7 min	Based on trends from the prior day's Student Work Analysis, the teacher highlights a common misconception, addresses an error in student work, or provides additional practice with a specific standards-based question type.
Frame	3 min	Teacher briefly introduces the topic for the day, explains how it relates to previous topics, or makes a connection to the real world
Model	5 min	Teacher clearly explains and models the skill for the day, being sure to highlight common misconceptions, provide criterion for success, and model top-quality work.
Practice	25 min	Students will spend time solving problem, then time completing practice problems individually, with partners, or in a small group, and finally, participating in class discussion. The teacher actively circulates the room to give feedback on annotations, work organization, question responses, pacing, and stamina. The teacher pauses the class 1-3 times to provide batch feedback or address a common misconception.
Exit Ticket	10 min	Students independently complete an exit ticket that assesses the skills learned that day.

**Figure 4.13: Mathematics Units and Topics by Grade**

5 <sup>th</sup> Grade Units and Topics		
Unit	# Days	Topics
Unit 1	29	<ul style="list-style-type: none"> <li>Place Value</li> <li>Decimal Fractions</li> <li>Multi-Digit Whole Number and Decimal Fraction Operations (9 days)</li> </ul>
Unit 2	22	<ul style="list-style-type: none"> <li>Multi-Digit Whole Number and Decimal Fraction Operations</li> </ul>
Unit 3	29	<ul style="list-style-type: none"> <li>Addition and Subtraction of Fractions (22 days)</li> <li>Multiplication and Division of Fractions and Decimal Fractions (7 days)</li> </ul>
Unit 4	24	<ul style="list-style-type: none"> <li>Multiplication and Division of Fractions and Decimal Fractions</li> </ul>
Unit 5	36	<ul style="list-style-type: none"> <li>Addition and Multiplication with Volume and Area (25 days)</li> <li>Review (11 days)</li> </ul>
Unit 6	23	<ul style="list-style-type: none"> <li>Problem Solving with the Coordinate Plane</li> </ul>
6 <sup>th</sup> Grade Units and Topics		
Unit	# Days	Topics
Unit 1	29	<ul style="list-style-type: none"> <li>Ratios and Unit Rates (29 days)</li> </ul>
Unit 2	22	<ul style="list-style-type: none"> <li>Arithmetic Operations Including Dividing by a Fraction (22 days)</li> </ul>
Unit 3	29	<ul style="list-style-type: none"> <li>Rational Numbers (22 days)</li> <li>Expressions and Equations (7 days)</li> </ul>
Unit 4	24	<ul style="list-style-type: none"> <li>Expressions and Equations (24 days)</li> </ul>
Unit 5	36	<ul style="list-style-type: none"> <li>Expressions and Equations (10 days)</li> <li>Area, Surface Area, and Volume Problems (25 days)</li> </ul>
Unit 6	23	<ul style="list-style-type: none"> <li>Statistics (23 days)</li> </ul>
7 <sup>th</sup> Grade Units and Topics		
Unit	# Days	Topics
Unit 1	29	<ul style="list-style-type: none"> <li>Ratios and Proportional Relationships (29 days)</li> </ul>
Unit 2	22	<ul style="list-style-type: none"> <li>Rational Numbers (22 days)</li> </ul>
Unit 3	29	<ul style="list-style-type: none"> <li>Rational Numbers (8 days)</li> <li>Expressions and Equations (21 days)</li> </ul>
Unit 4	24	<ul style="list-style-type: none"> <li>Expressions and Equations (14 days)</li> </ul>

		<ul style="list-style-type: none"> <li>Percent and Proportional Relationships (10 days)</li> </ul>
Unit 5	36	<ul style="list-style-type: none"> <li>Percent and Proportional Relationships (15 days)</li> <li>Statistics and Probability (21 days)</li> </ul>
Unit 6	23	<ul style="list-style-type: none"> <li>Geometry (23 days)</li> </ul>
8 <sup>th</sup> Grade Units and Topics		
Unit	# Days	Topics
Unit 1	29	<ul style="list-style-type: none"> <li>Integer Exponents and the Scientific Notation (20 days)</li> <li>The Concept of Congruence (9 days)</li> </ul>
Unit 2	22	<ul style="list-style-type: none"> <li>The Concept of Congruence (16 days)</li> <li>Similarity (6 days)</li> </ul>
Unit 3	29	<ul style="list-style-type: none"> <li>Similarity (19 days)</li> <li>Linear Equations (10 days)</li> </ul>
Unit 4	24	<ul style="list-style-type: none"> <li>Linear Equations (24 days)</li> </ul>
Unit 5	36	<ul style="list-style-type: none"> <li>Example of Functions from Geometry (15 days)</li> <li>Linear Functions (21 days)</li> </ul>
Unit 6	23	<ul style="list-style-type: none"> <li>Introduction to Irrational Numbers Using Geometry</li> </ul>

**Social Studies.** Social Studies at Vanguard Collegiate operates much like a literacy course. Fifth and sixth grade Social Studies courses are backwards mapped from the AP World History Exam and seventh and eighth grade Social Studies courses are backwards mapped from the AP US History Exam. Our Social Studies courses have three primary foci: (1) Analysis of complex primary and secondary documents, (2) Document Based Question (DBQ) writing, and (3) Oral language development. Students study content in 10-12 day cycles that include 5-6 days of text-based analysis and context building, one day of formal oral discussion, and 4-5 days of Document Based Question writing. **Figure 4.14** outlines the Social Studies scholar benchmarks.

**Figure 4.14: Social Studies End of Year Benchmarks**

5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade
<ul style="list-style-type: none"> <li>-Mastery of context, thesis, and evidence</li> <li>-Mastery of audience, purpose, and historical context</li> <li>-DBQ paragraphs</li> </ul>	<ul style="list-style-type: none"> <li>-Mastery of context, thesis, and evidence.</li> <li>-Mastery of audience, purpose, historical context and point of view</li> <li>-DBQ paragraphs</li> </ul>	<ul style="list-style-type: none"> <li>-Mastery of context, thesis, assertions, evidence, and sourcing.</li> <li>-Mastery of historical context, audience, purpose, and point of view</li> <li>-DBQ essays</li> </ul>	<ul style="list-style-type: none"> <li>-Mastery of context, thesis, assertions, evidence, sourcing, and analysis</li> <li>-Mastery of historical context, audience, purpose, and point of view</li> <li>-DBQ essays</li> </ul>

**Figure 4.15: Social Studies Daily Lesson Agendas**

Daily Lesson Agenda for Text Based Lesson		
Element	Time	Description
Do Now	5 min	Secondary source, textbook, chart, video, image or article reading that provides background information about the day's lesson topic.
Frame	5 min	Teacher briefly introduces the focus question and sources for the day. Teacher leads the class in source line analysis for each document.
Time in Text	25 min	Students spend the bulk of the time during class in accountable independent reading of primary source documents, either individually, with partners, or in a small group. The teacher actively circulates the room to give feedback on annotations, or notes on point of view, audience, purpose, or historical context. The teacher pauses the class 1-3 times to provide batch feedback or address a common misconception.
Discussion	5 min	Students use accountable talk to discuss the focus question of the day.

Exit Ticket	10 min	Students write a historical paragraph in response to the focus question of the day.
Daily Lesson Agenda for Oral Discussion Lesson		
Lesson Element	Time	Description
Do Now	5 min	Students engage in individual goal setting based on the Oral Discussion Rubric
Frame	5 min	Teacher briefly introduces the focus question of the discussion. Students transition to Socratic Circle seats (scaffolded by grade level).
Discussion	25 min	Students spend the bulk of the time during class in Socratic Circle discussions. The inner circle speaks first and the outer circle evaluates their performance. Then students switch positions and the new inner circle engages in discussion on a different question. The teacher scores all students individually on their performance on the Oral Discussion Rubric and interjects when appropriate to re-direct the conversation to better drive at the key points.
Reflection	5 min	Students transition back to seats and complete a reflection on their individual performance based on the Oral Discussion Rubric
Exit Ticket	10 min	Students write a historical paragraph in response to the focus question of the day.
Daily Lesson Agenda for Writing Based Lessons		
Lesson Element	Time	Description
Do Now	7 min	Based on trends from the prior day's Student Work Analysis, the teacher highlights a common misconception, addresses an error in student work, or provides an additional model.
Frame	3 min	Teacher briefly introduces the aim for the day, provides clear criteria for success, and a model.
Time in Ink	35 min	Students spend the bulk of the time during class in accountable independent writing, either individually, with partners, or in a small group. The teacher actively circulates the room to give feedback on adherence to the criteria for success, rubric-aligned individual goals, pacing, and stamina. The teacher pauses the class 1-3 times to provide batch feedback or address a common misconception.
Exit Ticket	5 min	Students highlight the work that they did for the day so the teacher can easily provide feedback.

All Social Studies lesson types (text-based, oral discussion, and writing) have corresponding rubrics or criteria for success which ensure that the expectations for the lesson are clear for students and grading/feedback for students is consistent from teachers.

**Figures 4.15: Social Studies Document Analysis Criteria for Success**

Element	Criteria for Success
Source Line	• Annotates source line for important dates, time period, context, author, and genre
Historical Context	• Summarizes historical context impacting document using evidence from text or source
Audience	• Notes intended audience of the document using evidence from the source or document
Point of View	• Describes the author's point of view using evidence from the document including word choice, structure, tone, dialogue, imagery, or details
Purpose	• Analyzes the author's purpose using evidence from the document, source line, or historical context

**Figure 4.16: Social Studies Writing Criteria for Success**

Element	Criteria for Success
Historical Context	• Situates the argument by explaining the broader historical events, developments, or processes immediately relevant to the question

Thesis/ Assertions	<ul style="list-style-type: none"> <li>• Presents a thesis/assertion that make a historically defensible claim and responds to all parts of the question</li> </ul>
Sourcing	<ul style="list-style-type: none"> <li>• References and analyzes the source information for each document used</li> </ul>
Evidence	<ul style="list-style-type: none"> <li>• Uses the content of at least four documents to support the stated thesis or a relevant argument</li> </ul>
Analysis	<ul style="list-style-type: none"> <li>• Explains the significance of the author’s point of view, author’s purpose, historical context, and/or audience for all documents</li> </ul>

**Science.** Science at Vanguard Collegiate is aligned to the NGSS Standards and employs the 5E model of engage, explore, explain, elaborate, evaluate. The goal and expectation is for all scholars to master their grade level Indiana Academic Standards. **Figure 4.17** is a sample lesson agenda for a Vanguard Collegiate Science course. During Engage lessons, students develop genuine curiosity about new scientific content, concepts, and practices by developing and identifying worthwhile questions and topics to investigate or research. During Explore lessons, students conduct investigations and research to gather evidence. Students participate in experiences that will enable them to make meaning of scientific phenomena. During Explain lessons, students formally develop explanations for scientific phenomena by building upon the experiences of the Engage and Explore lessons and incorporating new information from the teacher and text. During Elaborate lessons, students apply and use scientific concepts and vocabulary in new situations in order to deepen understanding of content, concepts, and practices. Evaluate lessons have students demonstrate the depth and breadth of their understanding of science content, concepts, and practices to themselves and others, including the teacher.

**Figure 4.17: Daily Lesson Agendas for Science**

Daily Lesson Agenda for Engage Lesson		
Element	Time	Description
Framing	10 min	Students activate prior knowledge and teachers promote genuine student curiosity within a new science topic to allow for meaningful formative assessment.
Building a Body of Evidence	20 min	Students participate in an experience that allows them consider/generate questions that align with major unit concepts. This is strategically designed to provide appropriate support for use of science/engineering practices.
Explanation	10 min	Students share current thinking on major unit concepts, given the activity. Ideas may not be fully formed or accurate and may be influenced by their preconceptions. The teacher refrains from confirming or refuting accuracy of ideas presented.
Closing	10 min	Students reflect metacognitively on their engagement with concepts, as well as science and engineering practices.
Daily Lesson Agenda for Explore Lesson		
Element	Time	Description
Framing	10 min	Students make predictions/pose questions about phenomenon or consider a problem related to the main unit concepts.
Building a Body of Evidence	20 min	Students engage in a hands-on common experience that “levels the playing field” for students with different background knowledge.
Explanation	10 min	Students think critically about the data collected by themselves and their peers. They begin to make meaning of their data. The teacher refrains from confirming or refuting accuracy of ideas presented.
Closing	10 min	Students reflect metacognitively on their engagement with concepts, as well as science and engineering practices.
Daily Lesson Agenda for Explain Lesson		
Element	Time	Description
Framing	10 min	Students reflect on emerging ideas from previous investigations and make connections to the learning for the day.

Building a Body of Evidence	20 min	Students examine currently accepted science ideas in light of evidence gathered from investigations. Formal definitions and terminology are introduced for the first time.
Explanation	10 min	Students construct scientific explanations or propose solutions. Science concepts are expressed in students' own words with viable justifications for their thinking. Students attempt to use formal terminology.
Closing	10 min	Students reflect metacognitively on their engagement with concepts as well as science and engineering practices.
<b>Daily Lesson Agenda for Elaborate Lesson</b>		
<b>Element</b>	<b>Time</b>	<b>Description</b>
Framing	10 min	Students reflect on currently accepted science ideas related to major unit concepts. They use these ideas to focus the investigation of these concepts in a new context.
Building a Body of Evidence	20 min	Students engage in investigation that allows them to consider major unit concepts in a deeper or broader context.
Explanation	10 min	Students use, think critically about and make sense of data in light of currently accepted science ideas. They consider alternative explanations or solutions.
Closing	10 min	Students reflect metacognitively on their engagement with concepts as well as science and engineering practices.
<b>Daily Lesson Agenda for Evaluate Lesson</b>		
<b>Element</b>	<b>Time</b>	<b>Description</b>
Framing	5 min	Students briefly review key information and can articulate the goals and rationale for the core activity of the day.
Building a Body of Evidence	10 min	Students engage in investigation that serves as an authentic context for assessing proficiency with science and engineering practices, disciplinary core ideas, and crosscutting central concepts.
Explanation	25 min	Students respond to open-ended questions using observations, data, evidence, and previously accepted explanations or solution to illuminate their understanding of major unit concepts.
Closing	10 min	Students reflect metacognitively on their engagement with concepts as well as science and engineering practices. They have explicit opportunities for self-assessment, peer-assessment, and formal teacher assessment.



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 5 Academic and Exit Standards**

**Attachment 5: Provide the school’s Exit Standards for graduating students for each division of the school as applicable (elementary, middle and/or high school), which should include the following:**

- a. What students in the last grade in each division will know.
  - b. What students in the last grade in each division will be able to do.
- 

At Vanguard Collegiate, we intently focus on ensuring students are prepared academically, both with the skills and habits to be successful in high school and beyond. Our exit standards include all 8<sup>th</sup> grade Indiana Academic Standards, as outlined below, as well as, completion of our **Capstone Project**, demonstrating mastery of research, technology, and project management skills as well as our core values.

### **English Language Arts**

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**READING: Literature** There are three key areas found in the Reading: Literature section for grades 6-12: Key Ideas and Textual Support, Structural Elements and Organization, and Synthesis and Connection of Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Literature.

- 8.RL.1** Read a variety of literature within a range of complexity appropriate for grades 6-8. By the end of grade 8, students interact with texts proficiently and independently.
- 8.RL.2.1** Cite the textual evidence that most strongly supports an analysis of what a text says explicitly as well as inferences drawn from the text.
- 8.RL.2.2** Analyze the development of a theme or central idea over the course of a work of literature, including its relationship to the characters, setting, and plot; provide a detailed summary that supports the analysis.
- 8.RL.2.3** Analyze how particular lines of dialogue or incidents in a work of literature propel the action, reveal aspects of a character, or provoke a decision.
- 8.RL.2.4** Students are expected to build upon and continue applying concepts learned previously.
- 8.RL.3.1** Compare and contrast structure of two or more related works of literature (e.g., similar topic/ theme), and analyze and evaluate how differing structure of each text contributes to its meaning and style.
- 8.RL.3.2** Analyze a particular point of view or cultural experience in a work of world literature considering how it reflects heritage, traditions, attitudes, and beliefs.
- 8.RL.4.1** Analyze the extent to which a filmed or live production of a story or play stays faithful to or departs from the text or script, evaluating the choices made by the director or actors.
- 8.RL.4.2** Analyze how works of literature draw on and transform earlier texts.

### **READING: Nonfiction**

There are three key areas found in the Reading: Nonfiction section for grades 6-12: Key Ideas and Textual Support, Structural Elements and Organization, and Synthesis and Connection of Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Nonfiction.

- 8.RN.1** Read a variety of nonfiction within a range of complexity appropriate for grades 6-8. By the end of grade 8, students interact with texts proficiently and independently.
- 8.RN.2.1** Cite the textual evidence that most strongly supports an analysis of what a text says explicitly as well as inferences drawn from the text.
- 8.RN.2.2** Analyze the development of a central idea over the course of a text, including its relationship to supporting ideas; provide a detailed, objective summary of the text.
- 8.RN.2.3** Analyze how a text makes connections and distinctions among individuals, events, and ideas.
- 8.RN.3.1** Students are expected to build upon and continue applying concepts learned previously.
- 8.RN.3.2** Analyze in detail the structure of a specific paragraph in a text, including the role of particular sentences in developing and refining a key concept.
- 8.RN.3.3** Determine an author’s perspective or purpose in a text, and analyze how the author acknowledges and responds to conflicting evidence or viewpoints.

- 8.RN.4.1** Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced.
- 8.RN.4.2** Evaluate the advantages and disadvantages of using different mediums (e.g., print or digital text, video, multimedia) to present a particular topic or idea.
- 8.RN.4.3** Analyze a case in which two or more texts provide conflicting information on the same topic and identify where the texts disagree on matters of fact or interpretation.

**READING: Vocabulary** There are two key areas found in the Reading: Vocabulary section for grades 6-12: Vocabulary Building and Vocabulary in Literature and Nonfiction Texts. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Vocabulary.

- 8.RV.1** Acquire and use accurately grade-appropriate general academic and content-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.
- 8.RV.2.1** Use context to determine or clarify the meaning of words and phrases.
- 8.RV.2.2** Students are expected to build upon and continue applying concepts learned previously.
- 8.RV.2.3** Distinguish among the connotations of words with similar denotations.
- 8.RV.2.4** Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., precede, recede, secede).
- 8.RV.2.5** Select appropriate general and specialized reference materials, both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning, part of speech, or origin.
- 8.RV.3.1** Analyze the meaning of words and phrases as they are used in works of literature, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
- 8.RV.3.2** Determine the meaning of words and phrases as they are used in a nonfiction text, including figurative, connotative, and technical meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
- 8.RV.3.3** Interpret figures of speech (e.g., verbal irony, puns) in context.

## WRITING

**Guiding Principle:** Students employ a wide range of strategies as they write and use different writing process elements appropriately to communicate with different audiences for a variety of purposes. Students apply knowledge of language structure, language conventions, media techniques, figurative language, and genre to create, critique, and discuss writing. Students conduct research on issues and interests by generating ideas and questions, and by posing problems. They gather, evaluate, and synthesize data from a variety of sources to communicate their discoveries in ways that suit their purpose and audience. There are four key areas found in the Writing section for grades 6-12: Writing Genres, the Writing Process, the Research Process, and Conventions of Standard English. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Writing.

- 8.W.1** Write routinely over a variety of time frames for a range of tasks, purposes, and audiences; apply reading standards to support analysis, reflection, and research by drawing evidence from literature and nonfiction texts.
- 8.W.2** Students are expected to build upon and continue applying concepts learned previously.
- 8.W.3.1** Write **arguments** in a variety of forms that –
  - Introduce claim(s), acknowledge and distinguish the claim(s) from alternate or opposing claims, and organize the reasons and evidence logically.
  - Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text.
  - Use effective transitions to create cohesion and clarify the relationships among claim(s), counterclaims, reasons, and evidence.
  - Establish and maintain a consistent style and tone appropriate to purpose and audience.
  - Provide a concluding statement or section that follows from and supports the argument presented.

- Write informative compositions in a variety of forms that –
- 8.W.3.2**
- Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information into broader categories; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension.
  - Develop the topic with relevant, well-chosen facts, definitions, concrete details, quotations, or other information and examples from various sources and texts.
  - Use appropriate and varied transitions to create cohesion and clarify the relationships among ideas and concepts.
  - Choose language and content-specific vocabulary that express ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.
  - Establish and maintain a style appropriate to the purpose and audience.
  - Provide a concluding statement or section that follows from and supports the information or explanation presented.
- 8.W.3.3** Write narrative compositions in a variety of forms that –
- Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters.
  - Organize an event sequence (e.g., conflict, climax, resolution) that unfolds naturally and logically, using a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another.
  - Use narrative techniques, such as dialogue, pacing, description, and reflection, to develop experiences, events, and/or characters.
  - Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events.
  - Provide an ending that follows from and reflects on the narrated experiences or events.
- 8.W.4** Apply the writing process to –
- Plan and develop; draft; revise using appropriate reference materials; rewrite; try a new approach; and edit to produce and strengthen writing that is clear and coherent, with some guidance and support from peers and adults.
  - Use technology to interact and collaborate with others to generate, produce, and publish writing and present information and ideas efficiently.
- 8.W.5** Conduct short research assignments and tasks to build knowledge about the research process and the topic under study.
- Formulate a research question.
  - Gather relevant information from multiple sources, using search terms effectively, and annotate sources.
  - Assess the credibility and accuracy of each source.
  - Quote or paraphrase the information and conclusions of others.
  - Avoid plagiarism and follow a standard format for citation.
  - Present information, choosing from a variety of formats.
- 8.W.6.1** Demonstrate command of English grammar and usage, focusing on:
- 8.W.6.1a** **Pronouns** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.1b** **Verbs** – Explaining the function of verbals (gerunds, participles, infinitives) in general and their function in particular sentences; forming and using active and passive voice; recognizing and correcting inappropriate shifts in verb voice.
- 8.W.6.1c** **Adjectives and Adverbs** –  
Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.1d** **Phrases and Clauses** – Students build upon and continue applying conventions learned previously.
- 8.W.6.1e** **Usage** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling focusing on:
- 8.W.6.2a** **Capitalization** – Students are expected to build upon and continue applying conventions learned previously.

- 8.W.6.2b Punctuation** – Using punctuation (comma, ellipsis, dash) to indicate a pause, break, or omission.
- 8.W.6.2c Spelling** – Students are expected to build upon and continue applying conventions learned previously.

## **SPEAKING AND LISTENING**

**Guiding Principle:** Students listen actively and communicate effectively for a variety of purposes, including for learning, enjoyment, persuasion, and the exchange of information and ideas. Students adjust their use of language to communicate effectively with a variety of audiences and for different purposes. Students develop an understanding of and respect for diversity in language use, patterns, and dialects. There are three key areas found in the Speaking and Listening section for grades 6-12: Discussion and Collaboration, Comprehension, and Presentation of Knowledge and Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Speaking and Listening.

- 8.SL.1** Listen actively and adjust the use of spoken language (e.g., conventions, style, vocabulary) to communicate effectively with a variety of audiences and for different purposes.
- 8.SL.2.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) on grade-appropriate topics, texts, and issues, building on others' ideas, expressing personal ideas clearly.
- 8.SL.2.2** Examine, analyze, and reflect on ideas under discussion by identifying specific evidence from materials under study and other resources.
- 8.SL.2.3** Follow rules for considerate discussions and decision-making, track progress toward specific goals and deadlines, and define individual roles as needed.
- 8.SL.2.4** Pose questions that connect the ideas of several speakers and respond to others' questions and comments with relevant evidence, observations, and ideas.
- 8.SL.2.5** Acknowledge new information expressed by others, and, when warranted, qualify or justify personal views in reference to the evidence presented.
- 8.SL.3.1** Analyze the purpose of information presented in diverse media and formats (e.g., visually, quantitatively, orally) and evaluate the motives (e.g., social, commercial, political) behind its presentation.
- 8.SL.3.2** Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and relevance and sufficiency of the evidence and identifying when irrelevant evidence is introduced.
- 8.SL.4.1** Present claims and findings, emphasizing salient points in a focused, coherent manner with relevant evidence, sound valid reasoning, and well-chosen details; use appropriate eye contact, adequate volume, and clear pronunciation.
- 8.SL.4.2** Create engaging presentations that integrate multimedia components and visual displays to clarify information, strengthen claims and evidence, and add interest.
- 8.SL.4.3** Students are expected to build upon and continue applying concepts learned previously.

## **MEDIA LITERACY**

**Guiding Principle:** Students develop critical thinking about the messages received and created by media. Students recognize that media are a part of culture and function as agents of socialization and develop understanding that people use individual skills, beliefs, and experiences to construct their own meanings from media messages. Students develop media literacy skills in order to become more informed, reflective, and engaged participants in society. By demonstrating the skills listed in Media Literacy, students should be able to meet the Learning Outcome for Media Literacy.

### **Learning Outcome**

- 8.ML.1** Critically analyze information found in electronic, print, and mass media used to inform, persuade, entertain, and transmit culture.
- 8.ML.2.1** Identify and analyze persuasive and propaganda techniques used in visual and verbal messages by electronic, print and mass media, and identify false or misleading information.
- 8.ML.2.2** Analyze and interpret how people experience media messages differently, depending on point of view, culture, etc.

## Mathematics Exit Standards

### **MATHEMATICS: GRADE 8**

*The Mathematics standards for grade 8 are supplemented by the Process Standards for Mathematics.*

The Mathematics standards for grade 8 are made up of 5 strands: Number Sense; Computation; Algebra and Functions; Geometry and Measurement; and Data Analysis, Statistics, and Probability. The skills listed in each strand indicate what students in grade 8 should know and be able to do in Mathematics.

#### **NUMBER SENSE**

<b>GRADE 8</b>
<b>8.NS.1:</b> Give examples of rational and irrational numbers and explain the difference between them. Understand that every number has a decimal expansion; for rational numbers, show that the decimal expansion terminates or repeats, and convert a decimal expansion that repeats into a rational number.
<b>8.NS.2:</b> Use rational approximations of irrational numbers to compare the size of irrational numbers, plot them approximately on a number line, and estimate the value of expressions involving irrational numbers.
<b>8.NS.3:</b> Given a numeric expression with common rational number bases and integer exponents, apply the properties of exponents to generate equivalent expressions.
<b>8.NS.4:</b> Use square root symbols to represent solutions to equations of the form $x^2 = p$ , where $p$ is a positive rational number.

#### **COMPUTATION**

<b>GRADE 8</b>
<b>8.C.1:</b> Solve real-world problems with rational numbers by using multiple operations.
<b>8.C.2:</b> Solve real-world and other mathematical problems involving numbers expressed in scientific notation, including problems where both decimal and scientific notation are used. Interpret scientific notation that has been generated by technology, such as a scientific calculator, graphing calculator, or excel spreadsheet.

#### **DATA ANALYSIS, STATISTICS, AND PROBABILITY**

<b>GRADE 8</b>
<b>8.DSP.1:</b> Construct and interpret scatter plots for bivariate measurement data to investigate patterns of association between two quantitative variables. Describe patterns such as clustering, outliers, positive or negative association, linear association, and nonlinear association.
<b>8.DSP.2:</b> Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line, and describe the model fit by judging the closeness of the data points to the line.
<b>8.DSP.3:</b> Write and use equations that model linear relationships to make predictions, including interpolation and extrapolation, in real-world situations involving bivariate measurement data; interpret the slope and y-intercept.
<b>8.DSP.4:</b> Understand that, just as with simple events, the probability of a compound event is the fraction of outcomes in the sample space for which the compound event occurs. Understand and use appropriate terminology to describe independent, dependent, complementary, and mutually exclusive events.
<b>8.DSP.5:</b> Represent sample spaces and find probabilities of compound events (independent and dependent) using methods, such as organized lists, tables, and tree diagrams.
<b>8.DSP.6:</b> For events with a large number of outcomes, understand the use of the multiplication counting principle. Develop the multiplication counting principle and apply it to situations with a large number of outcomes.

## ALGEBRA AND FUNCTIONS

GRADE 8
<b>8.AF.1:</b> Solve linear equations with rational number coefficients fluently, including equations whose solutions require expanding expressions using the distributive property and collecting like terms. Represent real-world problems using linear equations and inequalities in one variable and solve such problems.
<b>8.AF.2:</b> Give examples of linear equations in one variable with one solution, infinitely many solutions, or no solutions. Show which of these possibilities is the case by transforming a given equation into simpler forms, until an equivalent equation of the form $x = a$ , $a = a$ , or $a = b$ results (where $a$ and $b$ are different numbers).
<b>8.AF.3:</b> Understand that a function assigns to each $x$ -value (independent variable) exactly one $y$ -value (dependent variable), and that the graph of a function is the set of ordered pairs $(x,y)$ .
<b>8.AF.4:</b> Describe qualitatively the functional relationship between two quantities by analyzing a graph (e.g., where the function is increasing or decreasing, linear or nonlinear, has a maximum or minimum value). Sketch a graph that exhibits the qualitative features of a function that has been verbally described.
<b>8.AF.5:</b> Interpret the equation $y = mx + b$ as defining a linear function, whose graph is a straight line; give examples of functions that are not linear. Describe similarities and differences between linear and nonlinear functions from tables, graphs, verbal descriptions, and equations.
<b>8.AF.6:</b> Construct a function to model a linear relationship between two quantities given a verbal description, table of values, or graph. Recognize in $y = mx + b$ that $m$ is the slope (rate of change) and $b$ is the $y$ -intercept of the graph, and describe the meaning of each in the context of a problem.
<b>8.AF.7:</b> Compare properties of two linear functions given in different forms, such as a table of values, equation, verbal description, and graph (e.g., compare a distance-time graph to a distance-time equation to determine which of two moving objects has greater speed).
<b>8.AF.8:</b> Understand that solutions to a system of two linear equations correspond to points of intersection of their graphs because points of intersection satisfy both equations simultaneously. Approximate the solution of a system of equations by graphing and interpreting the reasonableness of the approximation.

## GEOMETRY AND MEASUREMENT

GRADE 8
<b>8.GM.1:</b> Identify, define and describe attributes of three-dimensional geometric objects (right rectangular prisms, cylinders, cones, spheres, and pyramids). Explore the effects of slicing these objects using appropriate technology and describe the two-dimensional figure that results.
<b>8.GM.2:</b> Solve real-world and other mathematical problems involving volume of cones, spheres, and pyramids and surface area of spheres.
<b>8.GM.3:</b> Verify experimentally the properties of rotations, reflections, and translations, including: lines are mapped to lines, and line segments to line segments of the same length; angles are mapped to angles of the same measure; and parallel lines are mapped to parallel lines.
<b>8.GM.4:</b> Understand that a two-dimensional figure is congruent to another if the second can be obtained from the first by a sequence of rotations, reflections, and translations. Describe a sequence that exhibits the congruence between two given congruent figures.
<b>8.GM.5:</b> Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations. Describe a sequence that exhibits the similarity between two given similar figures.
<b>8.GM.6:</b> Describe the effect of dilations, translations, rotations, and reflections on two-dimensional figures using coordinates.
<b>8.GM.7:</b> Use inductive reasoning to explain the Pythagorean relationship.
<b>8.GM.8:</b> Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and other mathematical problems in two dimensions.
<b>8.GM.9:</b> Apply the Pythagorean Theorem to find the distance between two points in a coordinate plane.

<b>LEARNING OUTCOMES</b>	<b>LST.1: LEARNING OUTCOME FOR LITERACY IN SCIENCE/TECHNICAL SUBJECTS</b> <b>Read and comprehend science and technical texts independently and proficiently and write effectively for a variety of discipline-specific tasks, purposes, and audiences</b>
	<b>6-8.LST.1.1:</b> Read and comprehend science and technical texts within a range of complexity appropriate for grades 6-8 independently and proficiently by end of grade 8.
	<b>6-8.LST.1.2:</b> Write routinely over a variety of time frames for a range of discipline-specific tasks, purposes, and audiences.
<b>KEY IDEAS AND CONNECTIONS</b>	<b>LST.2: KEY IDEAS AND TEXTUAL SUPPORT (READING)</b> <b>Extract and construct meaning from science and technical texts using a comprehension skills</b>
	<b>6-8.LST.2.1:</b> Cite specific textual evidence to support analysis of science and technical texts.
	<b>6-8.LST.2.2:</b> Determine the central ideas or conclusions of a text; provide an accurate, objective summary of the text.
	<b>6-8.LST.2.3:</b> Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.
<b>STRUCTURAL ELEMENTS AND ORGANIZATION</b>	<b>LST.3: STRUCTURAL ELEMENTS AND ORGANIZATION (READING)</b> <b>Build understanding of science and technical texts, using knowledge of structural organization and author’s purpose and message</b>
	<b>6-8.LST.3.1:</b> Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to grades 6-8 texts and topics.
	<b>6-8.LST.3.2:</b> Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to an understanding of the topic.
	<b>6-8.LST.3.3:</b> Analyze the author’s purpose in providing an explanation, describing a procedure, or discussing an experiment in a text.
<b>SYNTHESIS AND CONNECTION</b>	<b>LST.4: SYNTHESIS AND CONNECTION OF IDEAS (READING)</b> <b>Build understanding of science and technical texts by synthesizing and connecting ideas and evaluating specific claims</b>
	<b>6-8.LST.4.1:</b> Integrate quantitative or technical information expressed in words in a text with a version of that information expressed visually (e.g., <i>in a flowchart, diagram, model, graph, or table</i> ).
	<b>6-8.LST.4.2:</b> Distinguish among facts, reasoned judgment based on research findings, and speculation in a text.
	<b>6-8.LST.4.3:</b> Compare and contrast the information gained from experiments, simulations, video, or multimedia sources with that gained from reading a text on the same topic.
<b>WRITING GENRES</b>	<b>LST.5: WRITING GENRES (WRITING)</b> <b>Write for different purposes and to specific audiences or people</b>
	<b>6-8.LST.5.1:</b> Write arguments focused on discipline-specific content.
	<b>6-8.LST.5.2:</b> Write informative texts, including scientific procedures/experiments or technical processes that include precise descriptions and conclusions from data/research.

<b>THE WRITING</b>	<b>LST.6: THE WRITING PROCESS (WRITING)</b> <b>Produce coherent and legible documents by planning, drafting, revising, editing, and collaborating with others</b>
	<b>6-8.LST.6.1:</b> Plan and develop; draft; revise using appropriate reference materials; rewrite; try a new approach; and edit to produce and strengthen writing that is clear and coherent, with some guidance and support from peers and adults.
	<b>6-8.LST.6.2:</b> Use technology to produce and publish writing and present the relationships between information and ideas clearly and efficiently.
<b>THE RESEARCH PROCESS</b>	<b>LST.7: THE RESEARCH PROCESS (WRITING)</b> <b>Build knowledge about the research process and the topic under study by conducting short or more sustained research</b>
	<b>6-8.LST.7.1:</b> Conduct short research assignments and tasks to answer a question (including a self-generated question), or test a hypothesis, drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.
	<b>6-8.LST.7.2:</b> Gather relevant information from multiple sources, using search terms effectively; annotate sources; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation (e.g., <i>APA or CSE</i> ).
	<b>6-8.LST.7.3:</b> Draw evidence from informational texts to support analysis, reflection, and research.
<b>Physical Science (PS)</b>	
<b>8.PS.1</b> Create models to represent the arrangement and charges of subatomic particles in an atom (protons, neutrons and electrons). Understand the significance that the currently 118 known chemical elements combine to form all the matter in the universe.	
<b>8.PS.2</b> Illustrate with diagrams (drawings) how atoms are arranged in simple molecules. Distinguish between atoms, elements, molecules, and compounds.	
<b>8.PS.3</b> Use basic information provided for an element (atomic mass, atomic number, symbol, and name) to determine its place on the Periodic Table. Use this information to find the number of protons, neutrons, and electrons in an atom.	
<b>8.PS.4</b> Identify organizational patterns (radius, atomic number, atomic mass, properties and radioactivity) on the Periodic Table.	
<b>8.PS.5</b> Investigate the property of density and provide evidence that properties, such as density, do not change for a pure substance.	
<b>8.PS.6</b> Compare and contrast physical change vs. chemical change. Analyze the properties of substances before and after substances interact to determine if a chemical reaction has occurred.	
<b>8.PS.7</b> Balance chemical equations to show how the total number of atoms for each element does not change in chemical reactions and as a result, mass is always conserved in a closed system. (Law of Conservation of Mass.)	
<b>Life Science (LS)</b>	
<b>8.LS.1</b> Compare and contrast the transmission of genetic information in sexual and asexual reproduction. Research organisms that undergo these two types of reproduction.	
<b>8.LS.2</b> Demonstrate how genetic information is transmitted from parent to offspring through chromosomes via the process of meiosis. Explain how living things grow and develop.	

<b>Physical Science (PS)</b>	
<b>8.LS.3</b>	Create and analyze Punnett squares to calculate the probability of specific traits being passed from parents to offspring using different patterns of inheritance.
<b>8.LS.4</b>	Differentiate between and provide examples of acquired and genetically inherited traits.
<b>8.LS.5</b>	Explain how factors affecting natural selection (competition, genetic variations, environmental changes, and overproduction) increase or decrease a species' ability to survive and reproduce.
<b>8.LS.6</b>	Create models to show how the structures of chromatin, chromosomes, chromatids, genes, alleles and deoxyribonucleic acid (DNA) molecules are related and differ.
<b>8.LS.7</b>	Recognize organisms are classified into taxonomic levels according to shared characteristics. Explain how an organism's scientific name correlates to these shared characteristics.
<b>8.LS.8</b>	Explore and predict the evolutionary relationships between species looking at the anatomical differences among modern organisms and fossil organisms.
<b>8.LS.9</b>	Examine traits of individuals within a species that may give them an advantage or disadvantage to survive and reproduce in stable or changing environment.
<b>8.LS.10</b>	Gather and synthesize information about how humans alter organisms genetically through a variety of methods.
<b>8.LS.11</b>	Investigate how viruses and bacteria affect the human body.
<b>Earth and Space Science (ESS)</b>	
<b>8.ESS.1</b>	Research global temperatures over the past century. Compare and contrast data in relation to the theory of climate change.
<b>8.ESS.2</b>	Create a diagram or carry out a simulation to describe how water is cycled through the earth's crust, atmosphere and oceans. Explain how the water cycle is driven by energy from the sun and the force of gravity.
<b>8.ESS.3</b>	Research how human consumption of finite natural resources (i.e. coal, oil, natural gas, and clean water) and human activities have had an impact on the environment (i.e. causes of air, water, soil, light, and noise pollution).
<b>Engineering (E)</b>	
<b>6-8.E.1</b>	Identify the criteria and constraints of a design to ensure a successful solution, taking into account relevant scientific principles and potential impacts on people and the natural environment that may limit possible solutions.
<b>6-8.E.2</b>	Evaluate competing design solutions using a systematic process to identify how well they meet the criteria and constraints of the problem.
<b>6-8.E.3</b>	Analyze data from investigations to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.
<b>6-8.E.4</b>	Develop a prototype to generate data for repeated investigations and modify a proposed object, tool, or process such that an optimal design can be achieved.

**Social Studies Exit Standards**

**CONTENT STANDARDS**

**Standard 1 History**

**The American Revolution and Founding of the United States: 1754 to 1801**

**8.1.1** Identify the major Native American Indian groups of eastern North America and describe early conflict and cooperation between European settlers and these Native American groups.

- 8.1.2 Compare and contrast reasons for British, French, Spanish and Dutch colonization in the New World.
- 8.1.3 Explain the conditions, causes, consequences and significance of Britain's struggle to maintain control of colonies during the French and Indian War (1754–1763).
- 8.1.4 Identify and explain the reasons and actions for the resistance and rebellion against British imperial rule by the thirteen colonies in North America (1761–1775).
- 8.1.5 Analyze the causes and effects of the Revolutionary War (1775–1783), including the ideas from the Declaration of Independence, the enactment of the Articles of Confederation and the Treaty of Paris (1783).
- 8.1.6 Identify and give the significance of major events in the creation of the Constitution such as: the enactment of state constitutions, the Constitutional conventions, the willingness to compromise, and the Federalist- anti Federalist debates regarding the vote to ratify the Constitution.
- 8.1.7 Identify and explain the steps taken during the Washington Administration and the First and Second Congresses of the United States to establish a stable and lasting national government.
- 8.1.8 Compare and contrast the views of Thomas Jefferson and Alexander Hamilton and explain how their differences gave rise to the development of political parties.
- 8.1.9 Identify the events leading up to the presidential and congressional election of 1800 and the transfer of political authority and power to the Democratic-Republican Party led by Thomas Jefferson (1801); Evaluate the significance of these events.
- 8.1.10 Analyze the influence of important individuals on social and political developments of the time (1775 – 1800) such as the Independence movement and the framing of the Constitution.
- 8.1.11 Compare and contrast the ways of life in the northern and southern states, including the growth of towns and cities and the growth of industry in the North and the growing dependence on slavery and the production of cotton in the South.

#### **National Expansion and Reform: 1801 to 1861**

- 8.1.12 Interpret how the events surrounding the Louisiana Purchase (1803) and Lewis and Clark expedition (1803-1806) allowed for America's initial push towards westward expansion.
- 8.1.13 Explain the main issues, consequences, and landmark decisions of the Marshall Court.
- 8.1.14 Analyze the causes and consequences of the War of 1812.
- 8.1.15 Define nationalism and understand the direction nationalism gave to domestic and foreign policy and to the development of an industrial economy during this period.
- 8.1.16 Identify the key ideas of Jacksonian democracy and explain their influence on political participation, political parties and constitutional government; analyze Jackson's actions as President such as the destruction of the National Bank, the nullification crisis, and Jackson's Indian policy.
- 8.1.17 Explain relationships and conflict between settlers and Native Americans on the frontier.
- 8.1.18 Describe the causes, courses, challenges, compromises, and consequences associated with westward expansion, including the concept of Manifest Destiny.
- 8.1.19 Analyze the causes and effects of the Mexican War (1846-1848).
- 8.1.20 Give examples of how immigration affected American culture in the decades before and the Civil War, including growth of industrial sites in the North; religious differences; tensions between middle-class and working-class people, particularly in the Northeast; and intensification of cultural differences between the North and the South.
- 8.1.21 Give examples of the changing role of women, minorities, and immigrants in the northern, southern and western parts of the United States in the mid-nineteenth century, and examine possible causes for these changes.
- 8.1.22 Describe the abolitionist movement and identify figures and organizations involved in the debate over slavery, including leaders of the Underground Railroad
- 8.1.23 Analyze the influence of early individual social reformers and movements such as the abolitionist, feminist and social reform movements.

#### **The Civil War and Reconstruction Period: 1850 to 1877**

- 8.1.24 Analyze the causes and effects of events leading to the Civil War, and evaluate the impact issues such as states' rights and slavery had in developing America's sectional conflict.
- 8.1.25 Identify factors and individuals which influenced the outcome of Civil War and explain the significance of each.
- 8.1.26 Compare and contrast the three plans for Reconstruction and evaluate the merits of each.

**8.1.27** Describe causes and lasting effects of the Civil War and Reconstruction as well as the political controversies surrounding this time such as Andrew Johnson’s impeachment, the Black Codes, and the Compromise of 1877.

**Chronological Thinking, Historical Comprehension, Analysis and Interpretation, Research, and Issues-Analysis and Decision-Making**

**8.1.28** Recognize historical perspective and evaluate alternative courses of action by describing the historical context in which events unfolded.

**8.1.29** Differentiate between facts and historical interpretations of events, recognizing that the historian’s narrative reflects his or her judgment about the significance of particular facts.

**8.1.30** Using primary and secondary sources, analyze an issue confronting the United States from colonial times through the Reconstruction period.

**8.1.31** Compare and contrast examples of art, music, literature, and other forms of expression; explain how these reflect American culture during this time period.

**Standard 2 Civics and Government**

**Foundations of Government**

**8.2.1** Identify and explain essential ideas of constitutional government, which include limited government; rule of law; due process of law; separated and shared powers; checks and balances; federalism; popular sovereignty; republicanism; representative government; and individual rights to life, liberty and property; and freedom of conscience.

**8.2.2** Explain the concept of a separation of powers and how and why these powers are distributed, shared and limited in the constitutional government of the United States.

**8.2.3** Examine ways that the national government affects the everyday lives of people of the United States.

**Functions of Government**

**8.2.4** Compare and contrast the delegated, reserved, and concurrent powers (division of power or federal system) contained in the United States Constitution.

**8.2.5** Compare and contrast the different functions of national and state government within the federal system by analyzing the United States Constitution and the Indiana Constitution.

**Roles of Citizens**

**8.2.6** Recognize and explain the relationship between the rights and responsibilities of citizenship in the United States.

**8.2.7** Explain the importance of responsible participation by citizens in voluntary civil organizations to bring about social reform.

**8.2.8** Explain ways that citizens can participate in the election process (political parties, campaigns and elections) at the national, state, and local levels.

**8.2.9** Explain how citizens can monitor and influence the development and implementation of public policies at local, state and national levels of government.

**8.2.10** Research and defend positions on issues in which fundamental values and principles related to the United States Constitution are in conflict such as: 1<sup>st</sup> and 2<sup>nd</sup> Amendment rights, the right to privacy, and the rights of the individual.

**Standard 3 Geography**

**The World in Spatial Terms**

**8.3.1** Read maps to interpret symbols and determine the land forms and human features that represent physical and cultural characteristics of regions in the United States.

**Places and Regions**

**8.3.2** Read and interpret maps that portray the physical growth and development of the United States from colonization through Reconstruction (1877).

**Physical Systems**

**8.3.3** Identify and locate the major climate regions in the United States and describe characteristics of regions.

**8.3.4** Identify the major mountain ranges and river systems of the United States and explain the importance of these physical features in the development of America.

**Human Systems**

- 8.3.5 Identify the agricultural regions of the United States and be able to give explanations for how the land was used and developed during the growth of the United States.
- 8.3.6 Using maps identify changes influenced by growth, economic development and human migration in the United States.
- 8.3.7 Using primary and secondary sources, identify ways people modified the physical environment as the United States developed and describe the impacts that resulted.
- 8.3.8 Analyze human and physical factors that have influenced migration and settlement patterns and relate them to the economic development of the United States.
- 8.3.9 Identify and interpret maps, graphs and charts showing the distribution of natural resources such as forests, water sources and wildlife in the US at the beginning of the nineteenth century and give examples of how people exploited resources as the country became industrialized and people moved westward.

#### Standard 4 Economics

- 8.4.1 Identify economic factors contributing to European exploration and colonization in North America, the American Revolution and the drafting of the Constitution of the United States.
- 8.4.2 Identify and explain the four types of economic systems (traditional, command, market, and mixed); evaluate how the characteristics of a market economy have affected the economic and labor development of the United States.
  - \* **traditional economy:** an economy in which resources are allocated based on custom and tradition
  - \* **command economy:** an economy in which resources are allocated by the government or other central authority
  - \* **market economy:** an economy in which resources are allocated by decisions of individuals and businesses
  - \* **mixed economy:** an economic system combining private and public enterprise
- 8.4.3 Explain how federal, state, and local governments are involved in the economy of the United States.
- 8.4.4 Analyze contributions of entrepreneurs and inventors in the development of the United States economy to 1877.
- 8.4.5 Relate how new technology and inventions brought about changes in labor productivity in the United States in the eighteenth and nineteenth centuries.
- 8.4.6 Trace the development of different kinds of money used in the United States.
- 8.4.7 Trace the development of the banking system in the United States.
- 8.4.8 Explain and evaluate examples of domestic and international interdependence in United States history.
- 8.4.9 Examine the importance of borrowing and lending (the use of credit) in the United States economy and list the advantages and disadvantages of using credit.
- 8.4.10 Compare and contrast job skills needed in different time periods in United States history.

#### Capstone Project Exit Standards

**CAPSTONE PROJECT: Service Learning:** With guidance and approval of the teacher, each 8<sup>th</sup> grade student researches, designs and implements a community health and impact project in neighborhoods (CHIP IN) as their capstone project. Projects must meet a need in the community and be driven by the scholar(s). Students will work in small groups to complete the project during their 8<sup>th</sup> grade year. The expectation is for scholars to carefully managing the progress of their plans/timelines and adjust as needed. At the end of their project, scholars must complete an evaluation of their project that will highlight success, lessons learned, and demonstrate the need met. Students will be scored on a rubric that aligns with standards outlined below as well as their self-evaluation.

**ECC-3.1** Demonstrate components of critical and creative thinking.

**ECC---3.2** Apply decision---making processes.

**ECC---5.1** Demonstrate habits of mind (for example, taking responsible risks, thinking and communicating with clarity and precision, questioning and posing problems, thinking independently, applying past knowledge to new situations, remaining open to continuous learning).

**ECC--5.2** Demonstrate personal skills (for example, attendance, punctuality, responsibility, integrity, getting along with others) that are needed to succeed in school, life and career.

**ECC--5.4** Demonstrate personal leadership skills to lead and inspire others, accomplish common goals, and function

effectively in school, life and career settings.

**MLB---4.3** Use technology to investigate a variety of sources and media for research purposes

**MLB---4.5** Use various search techniques to refine outcomes for research

**MLB---4.6** Cite sources of information used in a proper format

**MLB---8.5** Review and update a high school graduation plan

**MLB---9.1** Demonstrate habits of mind such as taking responsible risks, thinking and communicating with clarity and precision, questioning and posing problems, and thinking independently

**MLB---9.2** Demonstrate personal and basic employability skills such as attendance, integrity, meeting deadlines, and dependability

**MLB---9.4** Demonstrate personal leadership skills to lead and inspire others, accomplish common goals, and function effectively in school, life and career settings

**MLB---9.5** Demonstrate school, life and career self---management skills related to responsibility and work ethic

**MLB---16.1** Identify and create personal and business correspondence which displays: clarity, professionalism, relevancy, and confidentiality

**MLB---16.2** Practice and exhibit active listening techniques

**MLB---16.3** Differentiate between types of internal and external communications and how they should be designed and distributed

**MLB---16.4** Demonstrate the concepts of collaboration with peers as they relate to successful communication both personally and professionally

**MLB---16.5** Display appropriate and professional techniques in public speaking as well as in written and nonverbal communications

**MLB---17.6** Create promotional materials for a new or existing product or service

**MLB---17.7** Define potential target markets for a specific product or service

**MLB---17.9** Discuss the importance of businesses giving back to the community



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 6**

## **School Calendar and Schedule**

**Attachment 6: Provide the school’s proposed calendar for the first year of operation, as well as the weekly schedule of classes, which should include the following:**

- a. An overview of academic and non-academic programs
  - b. The total number of instructional days in an academic year
  - c. The length of the school day, including start and dismissal times.
  - d. The number of instructional hours/minutes in the day for core subjects such as language arts, mathematics, science, and social studies.
- 

Vanguard Collegiate of Indianapolis’s extended school day and year model is driven first and foremost by our mission of ensuring students achieve academic success, and thus, subsequent life success. We provide 185 days of instruction annually, and our school calendar will operate on a trimester schedule.

**2018-2019 School Calendar**

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Vanguard Collegiate is designed based on the best practices of proven school models serving a similar demographic to that of the Westside of Indianapolis. Across the board, these high-performing urban public schools employ an extended day and year school model. Sharing similar beliefs that all students can and will achieve, Vanguard Collegiate will have a total of 185 school days annually.

The first day of school is August 1, 2018, and the last day of instruction is May 31, 2019. We will observe the following holidays: Labor Day, Martin Luther King, Jr. Day, Presidents’ Day, and Memorial Day. The calendar also provides days off for Fall Break, Thanksgiving, Winter Break, and Spring Break.

The 2018-2019 Annual Calendar can be found in **Figure 6.1**.

**Figure 6.1: 2018-2019 Calendar**

Vanguard Collegiate of Indianapolis 2018-2019 Academic Calendar							Key:	
July 2018								
Sun	Mon	Tues	Wed	Thurs	Fri	Sat		
1	2	3	4	5	6	7		
8	9	10	11	12	13	14		
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22	23	24	25	26	27	28		
29	30	31						
Instructional Days: 0								
August 2018								
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12	13	14	15	16	17	18		
19	20	21	22	23	24	25		
26	27	28	29	30	31			
Instructional Days: 22								
September 2018								
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16	17	18	19	20	21	22		
23	24	25	26	27	28	29		
30								
Instructional Days: 18								
October 2018								
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14	15	16	17	18	19	20		
21	22	23	24	25	26	27		
28	29	30	31					
Instructional Days: 19								
November 2018								
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Instructional Days: 18								
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Instructional Days: 13								
January 2019								
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Instructional Days: 19								
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Instructional Days: 16								
April 2019								
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Instructional Days: 20								
May 2019								
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26	27	28	29	30	31			
Instructional Days: 22								
June 2019								
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Instructional Days: 0								
							<b>Key:</b> <span style="background-color: #cccccc; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Staff PD Days <span style="background-color: #e0e0e0; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Report Card Conferences <span style="background-color: #d3d3d3; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Saturday Academy <span style="background-color: #ffffcc; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Family Orientation <span style="background-color: #ccffcc; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Summer School <span style="background-color: #ccffcc; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> MAP Testing <span style="background-color: #ccccff; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> End of Trimester <span style="background-color: #ffcc99; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> State Testing <span style="background-color: #ccccff; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Interim Assessments <span style="background-color: #ffcc99; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> School Holidays <span style="background-color: #ffcc99; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Back to School Night/Open House <span style="background-color: #ffcc99; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> Final Exams <span style="background-color: #ffcc99; border: 1px solid black; display: inline-block; width: 15px; height: 10px;"></span> First/Last Day of School	
							<b>Important Dates:</b> July 17-19: Family Orientation August 1: First Day of School August 7-9: NWEA MAP Testing August 14: Professional Development, No Students August 28: Back to School Night September 3: Memorial Day September 11-13: Interim Assessments September 14: Professional Development October 13 and 27 - Saturday Academy October 17-19 - Fall Break October 23-25: End of Trimester 1 Assessments October 29: Professional Development, No Students November 2: End of Trimester 1 November 3 and 17 - Saturday Academy November 6 & 7: Report Card Conferences November 21-23 - Thanksgiving Break November 26 - Professional Development December 1 and 15 - Saturday Academy December 11-13: Interim Assessments December 20 - January 1 - Winter Break January 2 - Professional Development January 8-9: NWEA MAP Testing January 21: MLK Day January 22: Professional Development February 12-15 - End of Trimester 2 Assessments February 18 - President's Day February 19 - Professional Development February 27-28 - ILEARN March 5-7 - ILEARN March 9 and 16 - Saturday Academy March 12 and 13: Report Card Conferences March 25-29: Spring Break April 1: Professional Development April 9-11: Interim Assessments April 13 and 20: Saturday Academy April 24-26: ILEARN May 1-3: ILEARN May 20-22: NWEA MAP Testing May 28-30: End of Course Assessments May 31: Last Day of School June 3-4: Professional Development June 3-14: Summer Academy	
							Days of Instruction: 185 Days of PD: 26	

## Frequent, Rigorous Assessments

To ensure we are reaching the high achievement bar to which we aim, Vanguard Collegiate of Indianapolis will administer regular assessments to monitor student progress and mastery in all content areas. In addition to the state-required **ILEARN** students will take mid and end of trimester **Interim Assessments**, **Final Exams**, and the **NWEA MAP** at the start, middle, and close of the year. The data from these assessments will measure student progress towards mastery of grade level standards. By analyzing this data, teachers can strategically plan remediation, both individual student, small group and whole group, to support this critical student mastery. **Figure 6.2** displays the 2018-2019 assessment calendar.

**Figure 6.2: Assessment Calendar**

Vanguard Collegiate of Indianapolis 2018-2019 Assessment Calendar																																																																																																																																											
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## Family Engagement

A strong school and family partnership is critical for student success in school. Vanguard Collegiate is committed to engaging with families regularly to share information regarding the school and effectively communicate student progress. During July, we host two **Family Orientation** nights, as well as a **Back to School Night** in August. These events share school policies and procedures as well as acclimate families to their child's schedule and classes. At the end of the first and second trimesters, **Trimester Conferences** are held, where families meet with teachers and receive their child's report card. At the end of each year, Vanguard Collegiate will host a school **Open House** to share both celebrate academic achievement and outline areas of growth for the upcoming school year. Not on the calendar are parent engagement sessions to be designed by the Director of Community Engagement to assist parents in the development of their child. These sessions will consist of internally created materials (i.e.- How to Help Your Child with Lifework, Testing Preparation: Eliminating Fear, Anxiety, and Underperformance, Math Made Easy, etc.) and bring in outside presenters for sessions (i.e. – Selecting the Best High School for You, Social Media and Teens, Mentoring Opportunities, etc.).

## Professional Development

Expectations for consistent and accountable school culture, instruction at the highest level, and regular analysis of rigorous assessment data require methodical development of staff. To that end, Vanguard Collegiate will provide fifteen (15) days of **Summer Professional Development**, eleven (11) days of school year Professional Development, including 5 **Data Days** and 6 days focused on school culture and instruction. Additionally, Vanguard Collegiate holds an abbreviated day every Friday, where student dismissal is at 2:00pm, allowing for two hours of weekly professional development. **Figure 6.3** displays the 2018-2019 professional development calendar.

**Figure 6.3: Professional Development Calendar**

Vanguard Collegiate of Indianapolis 2018-2019 Academic Calendar							Key:								
<b>July 2018</b>							<b>August 2018</b>							Staff PD Days	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Early Dismissal for Students	
1	2	3	4	5	6	7				1		2	3	4	School Holidays
8	9	10	11	12	13	14	5	6	7		8	9	10	11	First/Last Day of School
15	16	17	18	19	20	21	12	13	14	15	16	17	18	19	Days of Instruction: 185
22	23	24	25	26	27	28	19	20	21	22	23	24	25	26	Days of PD: 31
29	30	31					26	27	28	29	30	31			<b>Important Dates:</b>
Instructional Days: 0							Instructional Days: 23							July 11-31 - Professional Development	
<b>September 2018</b>							<b>October 2018</b>							August 1 - First day of school	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	August 10 and 24- Early dismissal	
						1		1	2	3	4	5	6	September 3 - Memorial Day	
2	3	4	5	6	7	8	7	8	9	10	11	12	13	September 4- Professional Development	
9	10	11	12	13	14	15	14	15	16	17	18	19	20	September 14 - Professional Development	
16	17	18	19	20	21	22	21	22	23	24	25	26	27	October 12 - Early Dismissal	
23	24	25	26	27	28	29	28	29	30	31				October 17-19 - Fall Break/HBCU College Tour	
30														October 29 - Professional Development	
Instructional Days: 18							Instructional Days: 19							November 9 - Early Dismissal	
<b>November 2018</b>							<b>December 2018</b>							November 21-23 - Thanksgiving Break	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	November 26 - Professional Development	
				1	2	3							1	December 14 - Early Dismissal	
4	5	6	7	8	9	10	2	3	4	5	6	7	8	December 20 - January 1 - Winter Break	
11	12	13	14	15	16	17	9	10	11	12	13	14	15	January 2 - Professional Development	
18	19	20	21	22	23	24	16	17	18	19	20	21	22	January 21 - MLK Day	
25	26	27	28	29	30		23	24	25	26	27	28	29	January 22 - Professional Development	
Instructional Days: 18							Instructional Days: 13							February 8 and 22 - Early Dismissal	
<b>January 2019</b>							<b>February 2019</b>							February 18 - President's Day	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	February 19 - Professional Development	
		1	2	3	4	5						1	2	March 8 and 22 - Early Dismissal	
6	7	8	9	10	11	12	3	4	5	6	7	8	9	March 25-29 - Spring Break	
13	14	15	16	17	18	19	10	11	12	13	14	15	16	April 1 and 22 - Professional Development	
20	21	22	23	24	25	26	17	18	19	20	21	22	23	May 27 - Memorial Day	
27	28	29	30	31			24	25	26	27	28			June 3-4 - Professional Development	
Instructional Days: 19							Instructional Days: 18								
<b>March 2019</b>							<b>April 2019</b>								
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat		
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3	4	5	6	7	8	9	7	8	9	10	11	12	13		
10	11	12	13	14	15	16	14	15	16	17	18	19	20		
17	18	19	20	21	22	23	21	22	23	24	25	26	27		
24	25	26	27	28	29	30	28	29	30						
31															
Instructional Days: 16							Instructional Days: 20								
<b>May 2019</b>							<b>June 2019</b>								
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Mon	Tues	Wed	Thurs	Fri	Sat		
			1	2	3	4							1		
5	6	7	8	9	10	11	2	3	4	5	6	7	8		
12	13	14	15	16	17	18	9	10	11	12	13	14	15		
19	20	21	22	23	24	25	16	17	18	19	20	21	22		
26	27	28	29	30	31		23	24	25	26	27	28	29		
Instructional Days: 22							Instructional Days: 0								

**Daily Schedule**

Vanguard Collegiate’s school day is from 7:30am – 4:30 pm Monday through Thursday, with a 2:00pm dismissal each Friday to allow time for staff Professional Development. Student arrival and breakfast take place from 7:30 am-7:50 am, which is when Morning Motivation begins. Promptly at 8:00 am, academic classes begin. Monday through Thursday, students have 160 minutes of literacy daily including a 50-minute Reading class, a 50-minute writing class, and 60-minutes for Reading Power Hour. They also have extended time for mathematics, with and 110 minutes each day, including a 50-minute math class and a 60-minute Math Power Hour. Students also have 50 minutes daily of Science, Social Studies, and their Co-Curricular Class. Co-curricular courses are 50 minutes daily, Monday-Thursday and include once-weekly Physical Education, and Coding (First Trimester), Critical Thinking (Second Trimester), or Fine Arts (Third Trimester) three times per week. Tutoring is offered daily in the last period of the school day. On Fridays, students have Reading, Writing, Math, Science, and Social Studies each for 50 minutes.

There are snack and restroom breaks twice daily (morning and afternoon) to ensure students are well-nourished over the day and are able to take strategic bathroom breaks as to not disrupt instruction. There are no transition periods in Lower Academy (5<sup>th</sup> and 6<sup>th</sup> grade) as our model has teachers transition classroom(s)



while students remain in the same room. In Upper Academy (7<sup>th</sup> and 8<sup>th</sup> grade), students will transition, as it prepares them for the culture and expectations of high school. During the 30-minute daily lunch, there will also be homework club - a study time scheduled for students to complete missing or incomplete homework, and detention for students who have demonstrated violations to our core values as outlined in **Attachment 8: Discipline Policy**. **Figure 6.4** provides the weekly schedule for grade 5, and **Figure 6.5** provides the weekly schedule for grade 6.

**Figure 6.4: Sample Weekly 5<sup>th</sup> Grade Schedule**

5 <sup>th</sup> Grade Schedule					
Monday – Thursday			Friday		
Morehouse 5		Indiana University 5	Time	Morehouse 5	Indiana University 5
7:30	Arrival, Breakfast, Morning Routines	Arrival, Breakfast, Morning Routines	7:30	Arrival, Breakfast, Morning Routines	Arrival, Breakfast, Morning Routines
7:50	Morning Motivation	Morning Motivation	7:50	Morning Motivation	Morning Motivation
8:00	Reading	Math	8:00	Reading	Math
8:50	Reading Power Hour	Math Power Hour	8:50	Writing	Science
9:50	Morning Break	Morning Break	9:40	Morning Break	Morning Break
10:00	Social Studies	Writing	9:50	Social Studies	Writing
10:50	Science	Reading	10:40	Math	Social Studies
11:40	Lunch/Recess	Lunch/Recess	11:30	Lunch/Recess	Lunch/Recess
12:10	Math Power Hour	Reading Power Hour	12:00	Science	Reading
1:10	Writing	Social Studies	12:50	Tutoring	Tutoring
2:00	Afternoon Break	Afternoon Break	1:30	Community Circle	Community Circle
2:10	Math	Physical Education	2:00	Dismissal	Dismissal
3:00	Physical Education	Science	Staff Professional Development		
3:50	Tutoring	Tutoring	Staff Professional Development		
4:30	Dismissal	Dismissal	Staff Professional Development		
<b>ELA Daily Minutes</b>			<b>ELA Daily Minutes</b>		
160			100		
<b>Math Daily Minutes</b>			<b>Math Daily Minutes</b>		
110			50		
<b>Science Daily Minutes</b>			<b>Science Daily Minutes</b>		
50			50		
<b>Social Studies Daily Minutes</b>			<b>Social Studies Daily Minutes</b>		
50			50		

**Figure 6.5: Sample Weekly 6<sup>th</sup> Grade Schedule**

<b>6<sup>th</sup> Grade Schedule</b>					
<b>Monday - Thursday</b>			<b>Friday</b>		
<b>Florida State 6</b>		<b>Spelman 6</b>	<b>Time</b>	<b>Florida State 6</b>	<b>Spelman 6</b>
7:30	Arrival, Breakfast, Morning Routines	Arrival, Breakfast, Morning Routines	7:30	Arrival, Breakfast, Morning Routines	Arrival, Breakfast, Morning Routines
7:50	Morning Motivation	Morning Motivation	7:50	Morning Motivation	Morning Motivation
8:00	Social Studies	Science	8:00	Social Studies	Reading
8:50	Reading Power Hour	Math Power Hour	8:50	Writing	Math
9:50	Morning Break	Morning Break	9:40	Morning Break	Morning Break
10:00	Reading	Coding	9:50	Math	Writing
10:50	Writing	Social Studies	10:40	Reading	Science
11:40	Lunch/Recess	Lunch/Recess	11:30	Lunch/Recess	Lunch/Recess
12:10	Math Power Hour	Reading Power Hour	12:00	Science	Social Studies
1:10	Math	Reading	12:50	Tutoring	Tutoring
2:00	Afternoon Break	Afternoon Break	1:30	Community Circle	Community Circle
2:10	Science	Writing	2:00	Dismissal	Dismissal
3:00	Coding	Math	Staff Professional Development		
3:50	Tutoring	Tutoring	<b>ELA Daily Minutes</b>		
4:30	Dismissal	Dismissal	160		
<b>ELA Daily Minutes</b>			<b>ELA Daily Minutes</b>		
160			100		
<b>Math Daily Minutes</b>			<b>Math Daily Minutes</b>		
110			50		
<b>Science Daily Minutes</b>			<b>Science Daily Minutes</b>		
50			50		
<b>Social Studies Daily Minutes</b>			<b>Social Studies Daily Minutes</b>		
50			50		



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 7**

# **Enrollment Policy**

**Attachment 7: Provide the school’s Enrollment Policy, which should include the following:**

- a. Any admission requirements, including an explanation of the purpose of any pre-admission activities for students or parents.
- b. Tentative dates for the application period, including enrollment deadlines and procedures, and an explanation of how the school will receive and process Intent to Enroll forms.
- c. Tentative lottery dates and procedures.
- d. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.

Vanguard Collegiate will open August 1, 2018 with 60 5<sup>th</sup> grade students and 60 6<sup>th</sup> grade students and will add one grade level at a time, until it has reached full enrollment of 480 total students in grades 5-8. In our inaugural year, we will enroll 120 students split between 5<sup>th</sup> and 6<sup>th</sup> grade to ensure we are able to hit our enrollment targets. In Year 2 and beyond, our entry point (grade 5) will enroll 120 new students each year. Using a slow growth model allows the school to strategically indoctrinate students into the culture, processes and procedures, and academic rigor necessary for their academic and behavioral success at and beyond Vanguard Collegiate. The school will be divided into two academies, the Lower Academy will include 5<sup>th</sup> and 6<sup>th</sup> grade, and the Upper Academy will include 7<sup>th</sup> and 8<sup>th</sup> grade. This Academy structure allows us to focus on implementation of a strong college preparatory curriculum with a focus on ensure all students are on grade level by the time they reach 7<sup>th</sup> grade, thus truly shifting our focus to critical and analytical thinking.

**Enrollment Plan.** Vanguard Collegiate’s enrollment plan can be found below in **Figure 7.1**. Included in the enrollment plan are number of students we will enroll for the first five years of school operation, as well as, the anticipated percentage of enrolled ELL, SPED and SNAP/TANF/Foster Care youth.

**Figure 7.1: Enrollment Plan**

Vanguard Collegiate Enrollment Plan								
ACADEMIC YEAR	5	6	7	8	TOTAL	% ELL	% SPED	SNAP, TANF or Foster Care
2018-2019	60	60	0	0	120	10%	10%	78% <sup>1</sup>
2019-2020	120	60	60	0	240	10%	10%	78%
2020-2021	120	120	60	60	360	10%	10%	78%
2021-2022	120	120	120	60	420	10%	10%	78%
2022-2023	120	120	120	120	480	10%	10%	78%

We anticipate, based on averages of local schools, a 7-10% attrition rate annually and will back fill all seats as required by Indiana State law. **Figure 7.2** displays the number of planned classes for each academic year. We will have a total of 4 classes in our first year of operation, growing to 16 when we reach full enrollment in 2022.

**Figure 7.2: Planned Number of Classes**

Planned Number of Classes					
ACADEMIC YEAR	5	6	7	8	TOTAL
2018-2019	2	2	0	0	4
2019-2020	4	2	2	0	8
2020-2021	4	4	2	2	12
2021-2022	4	4	4	2	14
2022-2023	4	4	4	4	16

<sup>1</sup> <http://interactives.indystar.com/news/standing/INSchoolData/>

**Pre-Admissions Activities.** In alignment with our belief that strong partnerships with parents support with student academic achievement, and with a deep commitment to being fully enrolled on the first day of school, Vanguard Collegiate has begun and will continue hold a number of pre-admissions activities. Attendance at these events is voluntary and will not impact student admission to the school. Pre-Admission Activities are outlined below in **Figure 7.3**.

**Figure 7.3 Pre-Admission Activities**

Event Type	Description	Anticipated Dates
Tabling	Staff and volunteers will engage in recruiting opportunities outside of organizations and local businesses. They will share flyers of information regarding Vanguard Collegiate and collect parent contact information. Target locations will be near the school and events that capture large crowds from/around the school's target area.	Beginning May 2017
Canvassing	Vanguard Collegiate staff and volunteers will door knock and canvass throughout high-traffic areas of the community (parks, grocery stores, libraries) to share information regarding Vanguard Collegiate.	Beginning April 2017
Community Events	Vanguard Collegiate will have a presence at events sponsored by local neighborhood organizations to help spread awareness regarding Vanguard collegiate and to collect family contact information.	Beginning May 2017
In-Home Conferences	The Executive Director will meet with the family of each student the spring and summer prior to opening. The goal of these meetings is to welcome families to Vanguard Collegiate, explain Vanguard Collegiate's Policies and Procedures, and answer questions families may have.	Spring 2018

**Admissions Requirements.** In compliance with Indiana Code 20-24-5-4, Vanguard Collegiate will establish open-enrollment policies and procedures that allow for open-enrollment for any age and grade appropriate applicant who resides in Indiana and who submits a timely application.

We will provide equal opportunities such as admissions and educational services to all students regardless of race, color, national origin, gender, age, disability, sexual orientation, family situation(s), religion, political affiliation, or veteran status in its educational programs and activities. All complaints or allegations of discrimination should be immediately submitted in writing to the Vanguard Collegiate of Indianapolis Executive Director, Robert Marshall. Should the number of applicants exceed available seats, then Vanguard Collegiate will adhere to Indiana Code 20-24-5-5<sup>2</sup> and employ a random lottery system in a public meeting no more than two weeks after our enrollment application deadline.

**Lottery Procedures.** Pursuant to IC 20-24-5-52, should the number of applicants exceed the number of available seats, we will hold a random drawing in a public meeting for student enrollment two weeks after the application deadline. The lottery will be governed by the following principles:

- All students who have submitted a formal application prior to the deadline will be allowed to enter the lottery. In 2018, the application window closes at 6:00PM on March 5.
- All students drawn in the public lottery will receive an offer for a seat in the school until all available entry grade seats are filled.
- Students who are drawn after all seats are filled will be added to an ordered wait list, and will come off the wait list once seats become available in the order they are listed.

- Applicants that have enrolled siblings will be entered into a separate lottery by grade and drawn before non-sibling applicants for that grade. Sibling preference is designed to ensure that all students within a family are able to, if desired, attend the same school.
- The lottery will be conducted within two weeks of the application deadline. In 2018, the lottery will occur on March 19 at a location to be determined but accessible by all.

Preference in the lottery will be given to students currently attending Vanguard Collegiate and siblings of students currently attending Vanguard Collegiate.

**Timeline.** Figure 7.4 exhibits the Year 1 Vanguard Collegiate enrollment process timeline.

**Figure 7.4: Year 1 Enrollment Timeline**

Date	Enrollment Action
November 14, 2017	Applications become available
March 5, 2018	Application window closes at 6:00pm
March 19, 2018	Public lottery hosted (if necessary)
March 23, 2018	Enrollment results mailed to families
April 2, 2018	Submission deadline for enrollment packet

**Waitlist, Re-enroll, Transfers.** Waitlisted students may also gain admission should a seat become available due to a student withdrawal and/or expulsion. All non-lottery winners will be automatically added to the waitlist. Applicants will be notified of their waitlist position no later than one week after the lottery. Waitlisted students will be offered enrolled when an open seat becomes available. At which point, they have two weeks from notification to formally reply with their intent to enroll/not enroll and submit their complete enrollment packet (school enrollment application, birth certificate, proof of address, and medical/immunization records). Failure to meet the deadline would result in forfeiture of the child’s seat within the school, which will be offered to the next student on our waitlist. This process will continue until either the seat is filled or the waitlist is exhausted.

Withdrawn students attempting to re-enroll will be placed at the last available seat on the waitlist order. If a seat is available, the withdrawn students may re-enroll and fill that empty seat. The same is true for transfer students.



VANGUARD COLLEGIATE  
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# **Attachment 8**

## **Student Discipline**

**Attachment 8: Provide the school’s Discipline Policy, which should include a summary of the following:**

- a. Practices the school will use to promote good discipline in the school, including both penalties for infractions and incentives for positive behavior.
- b. A preliminary list of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively.
- c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.
- d. A description of the appeal process that the school will employ for students facing expulsion.
- e. How students and parents will be informed of the school’s discipline policy.

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**Discipline Practices.** Vanguard Collegiate will create and maintain a safe, structure, joyous, and academically challenging school environment. Rooted in our school’s core values, our discipline policy is sets clear expectations, fosters community, is consistent, and protects instructional time. Our policy is in compliance with applicable laws and regulations. It will be implemented with fidelity to ensure the success of our scholars. In our highly-structured school environment, we hold students accountable to our expectations while simultaneously developing an achievement-oriented student community. Teachers plan engaging lessons and use school wide-systems and procedures to maximize instructional time and minimize confusion. Together, our staff place the highest value on student achievement and show students the path to success. We create a community where students learn and engage with difficult material, and where parents are our partners. We communicate frequently with families, reporting successes and challenges. The school staff enlists parents’ help in supporting student behavior. We believe in a community where students know what is expected of them, and we use structure and predictability to allow students to feel safe, protected, and included. This sense of community will come from showing and earning respect, and being firm and positive, even when issuing consequences.

**Positive Discipline.** In the first week of school, students will be explicitly taught and oriented to the culture, systems, and routines of Vanguard Collegiate. After the first week, these systems will be continuously reinforced and closely monitored by staff—both in classrooms as well as throughout our space, as to protect the integrity of instructional time. At each weekly community circle, students will recite the school values and will be recognized as individuals and classrooms for their ability to practically apply these values. To establish a joyful culture, we consistently celebrate students who demonstrate our core values both in the classroom and during Community Circle, which encourages all students to demonstrate the values regularly. During the week, students will earn merits for displaying positive behavior. Our positive student culture is established and maintained by creating a joyful environment, character coaching, and earned incentives. The day begins with a joyful Morning Meeting to set scholars’ day off right. Teachers build classrooms in which students *want* to learn using chants, positive framing of expected behaviors, and celebrating academic success. Teachers will be required to send a minimum of one (1) positive phone call for their assigned cohort weekly. Our staff will exemplify positivity and teamwork and collaborate constantly with parents and families. We include purposeful, intentional character coaching throughout the day. From Morning Meeting to Community Circle discussions, students will engage with our values- Team, Hard Work, Integrity, Nobility, and Knowledge. When communicating with students, we must make a conscious effort to both identify the traits of good citizens and give precise praise, so that our students can replicate successful and positive behaviors. We will teach our students that hard work and smart choices yield rewards. The earned incentives we will provide are reminders to our scholars that we notice when they do the right thing, which encourages other students to imitate those choices. Teachers will use tight routines to minimize time required to meet the basic, logistical needs and therefore create time for team building, joy and character work. **Figure 8.1** outlines teacher moves to set the stage for a joyful school community.

**Figure 8.1: Teacher Moves to Reinforce Positive Behavior**

Move	Description
<b>Model it</b>	“The children are ours. Every single one of them... <b>children have never been very good at listening to their elders, but have never failed to imitate them.</b> ” – James Baldwin. Teachers display behaviors they expect of students. For example, if a teacher request for scholars to “meet them in STAR,” then they will fold their hands modeling STAR as they monitor for compliance.
<b>Name it</b>	Only by labeling and talking about the character strengths can we embark on the journey to develop them. Give the intangible and often-unnamed a name. At the act, teachers will specifically name positive behaviors of students. For example, a teacher would say, “I love the way Jason is working diligently and exemplifying our value, Hard Work.”
<b>Find it</b>	Introduce students to real-world and fictional examples that display the various character strengths. For example, in Morning Motivation, the sentence starter for a group conversation may be “I feel like a Team when...”
<b>Feel it</b>	Help kids and adults feel the positive effects of focusing on and developing their own character strengths. Teachers would celebrate positive behaviors. For example, a scholar is recognized at Community Circle for exemplifying Team—called to the center, a brief statement about the behavior(s) is given, and peers deliver a ritualized cheer for the scholar.
<b>Integrate it</b>	Create dual-purpose experiences and lessons that involve the character strengths. A teacher would assign an essay question connected to text and our school values such as “Please describe how Esperanza displayed Integrity in Chapter 4. Provide textual evidence.”
<b>Encourage it</b>	Provide people with growth mindset praise (i.e. precise, descriptive praise) around character. For example, a teacher would say, “Morehouse is meeting the hallway expectations by walking silently, tracking with their hands to their sides, and tracking forward.”
<b>Track it</b>	Record and discuss progress toward character goals regularly. Use Merits and Demerits consistently - name them and enter them. Discuss Excellence Accounts with students to deepen their understanding of actions, consequences, and set goals.

**Individual Level Discipline.** Our individual discipline system is based on student choice. Students can choose to follow the rules and abide by our core values, or they can choose to violate the rules, and therefore, receive a consequence. Vanguard Collegiate will implement a “Paycheck” system, modeled after that of BES school Intrepid College Prep in Nashville, TN and Uncommon School Roxbury Prep in Boston, MA. Within Vanguard Collegiate’s token economy, students can earn “dollars” for demonstrating our core values, and “deductions” for violating the rules. If a student supports another student prepare for an upcoming assessment by studying flashcards during lunch, they would earn a “dollar” for Team. If a student calls out in class without raising his/her hand, they would receive a “deduction.” This system supports scholars to internalize and demonstrate our values by focusing on small behaviors, which decreases the frequency of larger student misbehaviors. For homework infractions, 5th and 6th grade students will be assigned to homework club during the lunch period. More than two infractions within any one week’s time will result in a loss of dollars and subsequent detention. Each week, students begin with 50 dollars in their paycheck, and if they earn a minimum of \$35 by the end of the week, they are celebrated during our weekly Community Circle. If they earn below a \$35 by the end of the week, they serve lunch detention on Friday. Our consistent implementation of this system will support students to internalize our core values and make positive behavior choices. Additionally, using a Paycheck system will teach students to understand the basics of a bank system. All dollars and deductions have no actual monetary value. **Figure 8.2** displays examples of infractions, earning/losing dollars, and connects them to a school value.

**Figure 8.2: Paycheck System Examples**

Action	Earn/Loss of Dollars	Value
Failure to comply with direction	Loss of Dollars - (i.e.- <i>Teacher’s response would be “-1 dollar. Please move with urgency next time.”</i> )	Integrity
Student does not bring class novel and is unprepared for class	Loss of Dollars - (i.e.- <i>Johnny, -1 dollar, having all materials for class is necessary to be learning.</i> )	Knowledge
Student answers cold call question correctly, uses scholarly language in his/her response, and provides sufficient evidence to support their response.	Earning Dollars - (i.e. – <i>Teacher says, “Strong use of academic language, Johnny. That’s +1 dollar.</i> )	Nobility

On the final Friday of the month, students can spend the dollars they have earned at the school store. The store will contain items like specialty pens/pencils, stickers, notebooks, extra uniform components, and special snacks. At the end of each trimester, if a student has an average of \$65 or more on their weekly paycheck, they become eligible to purchase membership into a positive behavior club. Membership is tiered with Silver, Gold, and Platinum membership—each coming with their own specific benefits. For example, at Silver, a student can be at the front of the line. At Gold, students receive a special snack once per week. At Platinum, a student is given first preference for special opportunities offered to students such as free tickets to see the Indiana Pacers. To maintain membership, students must keep a minimum average of \$65 dollars. This ensures incentivized high levels of sustained positive behavior.

**Classroom Level Discipline.** Each classroom will have a wall tracker for the overall academic work and behavior demonstrated during class with three cards: (1) Professional – followed directions, sat straight up in class, tracked the speaker, asked and answered questions, respected the community, transitioned silently, and used appropriate language and/or voice volume; (2) Unprofessional – multiple infractions, improper language and/or voice volume, disengaged from lesson, and disrespected self, peers or teachers; (3) Neutral – met basic expectations. Cohorts with 90% or more classes completed with a “professional” ranking will be rewarded with a combination of but not limited to the following options: recognition at community meeting, cohort trips, special cohort meals, and guest speakers. All classroom behavior will be using the School Runner system daily by respective teachers and both weekly and monthly by the school leadership team. At the end of each class period, the teacher will reflect with the class sharing specific feedback on their overall lesson, and will share which card they have earned.

To support in building a positive culture during the lesson, teachers are trained on least invasive discipline methods in general and the following four specifically:

- **Positive framing/narration** – This tool is used by explicitly and publicly stating the positive and desired behaviors a teacher wants to see from students when one or more meets the expectation. For example: A teacher gave a directive to write two reflective sentences on a text the class read as a group. The teacher would then say, “I love the way Katri is working diligently. She must have learned a lot from the reading. I cannot wait to hear everyone’s thoughts.”
- **Whole group redirections** – This tool allows teachers to not escalate situation(s) by alienating a student for a poor behavior decision. An example would be, “We are all reading our DEAR books.”
- **100%** - This tool ensures total engagement in class, which eliminates opportunities for poor behavior choices. If a teacher asked a question concerning the lesson that he/she believes all students should know, then he/she would say, “I should see ALL of our college-bound hands raised for this question.” If he/she still has non-compliant students, then they would say, “I am waiting on (insert number of students) scholars.” If no compliance, then a teacher could ask for all hands down,

remind students how/why they should know the answer, and allow them to confer with a shoulder partner. During the shoulder partner time, the teacher may have an opportunity to check-in/conference with the non-compliant student to first and foremost check for understand and secondly reiterate the expectation. Lastly, the teacher would re-start by giving the original question and expectation.

- **Proximity** – When giving group redirections and commanding 100%, an effective tool for teachers is to physically move to or towards the space of the non-compliant student. The movement should be non-threatening. However, their presence is meant to drive inaction into action.

**Behavior Continuum and Implications.** At Vanguard Collegiate, by focusing on the smaller behaviors, we lower the probability and frequency of more serious infractions happening. For example, having a pencil sharpening procedure protects instructional time by eliminating the opportunity for a student to disrupt peers on his/her way to sharpen the pencil. Sweating the small details allows staff members to stop behaviors from escalating into larger concerns, as outlined with examples of deductions. We take larger infractions seriously and in accordance with all Indiana State Laws. Examples of serious infractions include but are not limited to disrespect, disruption to instruction, fighting, and cheating. Attendance violations such as excessive tardiness or absenteeism are also considered serious violations. Theft and the use of alcohol, controlled substances and/or tobacco are explicitly prohibited. In Year 1, the Executive Director leads the system for addressing escalated behaviors. Upon being hired, the Dean of Culture will assume the primary responsibility of discipline and culture maintenance, training, and support. The tiered consequence system can be found in **Figure 8.3**.

**Figure 8.3: Consequence Level Behavior Examples**

	Consequences	Description	Behaviors
Tier 1	Deduction (loss of Scholar Dollar)	Small, immediate infractions that impede learning	<ul style="list-style-type: none"> <li>• Not following clear directions</li> <li>• Disruptions to classroom instruction</li> <li>• Off-task from assigned work</li> <li>• Out of seat without permission</li> <li>• Laying head down in class</li> </ul>
Tier 2	Deduction + 1:1 Conference with Teacher	Infractions that impede learning and impact the classroom and/or school community	<ul style="list-style-type: none"> <li>• Inappropriate or disrespectful response to consequence</li> <li>• Laughing at another student's answer</li> <li>• Two (2) demerits in one class</li> </ul>
Tier 3	Deduction + Detention	Violations of school policy connected to daily, school-wide expectations	<ul style="list-style-type: none"> <li>• Incomplete homework</li> <li>• Tardy to school</li> <li>• Out of uniform</li> </ul>
Tier 4	Office Referral + Detention	Scholars who exhibit the following infractions will earn a referral to the leadership team of the school, which will lead to at least an automatic detention and potential more severe consequences. All detentions occur during lunch, resulting in students losing social time.	<ul style="list-style-type: none"> <li>• Leaving class without permission</li> <li>• Talking back, arguing with another student or staff member</li> <li>• Three (3) demerits in one class</li> <li>• Five (5) demerits in one day</li> </ul>
Tier 5	Office Referral + In-class Separation	Breaches in the discipline policy or behaviors that impact educational integrity or does harm to the school community.	<ul style="list-style-type: none"> <li>• Leaving class without permission</li> <li>• Cheating on an assignment</li> <li>• More than three (3) demerits in one class</li> <li>• More than five (5) demerits in one day</li> <li>• Refusal to respond to redirection or engage in conversation with teacher</li> </ul>

<b>Tier 6</b>	Office Referral + In-school Suspension	Chronic breaches in discipline policy or behavior that creates a consistent classroom disruption or jeopardizes student or staff safety can result.	<ul style="list-style-type: none"> <li>• Bullying or intimidating another student</li> <li>• Constant disruptive behavior or continued / willful disobedience</li> <li>• Excessive disrespect</li> <li>• Open defiance to authority</li> <li>• Willfully causing or attempting to cause defacement or substantial damage to school property</li> <li>• Failure of the parent to attend a mandatory parent conference</li> <li>• Other misbehaviors identified at the discretion of school and leadership.</li> </ul>
<b>Tier 7</b>	Office Referral + Out-of-School Suspension	Serious breaches in discipline policy or behavior that creates a consistent classroom disruption or jeopardizes student or staff safety can result in a suspension for 1-3 days. Suspension determinations are made by the Executive Director and Dean of Culture (as hired). The Executive Director holds the right to extend a suspension beyond three days after discussing a student incident or incidents with school staff. The Board of Directors will be notified of all suspensions lasting longer than three days. In all instances of suspensions, parents or guardians will be informed via phone and letter stating the incident and duration of suspension. The students' family would be required to attend an in-person conference with a member of the school leadership team before the student would be allowed to return to school.	<ul style="list-style-type: none"> <li>• Fighting, hitting, or physical aggression toward another student</li> <li>• Taking or attempting to take money or property from another student or adult that does not belong to them.</li> <li>• Harassment or violent threats</li> <li>• Physical aggression towards teacher, staff member, or other adult at school</li> </ul>
<b>Tier 8</b>	Office Referral + Expulsion	Indiana law (Indiana Code – Section 20-33-8-19) provides the Executive Director with the authority to expel students without Board involvement for the following behaviors (Indiana Code – Section 20-33-8-14): student misconduct and substantial disobedience	<ul style="list-style-type: none"> <li>• Fighting/violent behavior resulting in serious injury or with the use of a weapon</li> <li>• Assault and battery against a school community member</li> <li>• Sexual assault against a school community member</li> <li>• Possession of a weapon or explosive device of any kind</li> <li>• Possession, use, or distribution of illegal or unauthorized prescription drugs</li> </ul>

**Suspensions.** Serious breaches in discipline policy or behavior that creates a consistent classroom disruption or jeopardizes student or staff safety can result in a suspension for 1-3 days. Suspension determinations are made by the Executive Director and Dean of Culture (as hired). The Executive Director holds the right to extend a suspension beyond three days after discussing a student incident or incidents with school staff. The Board of Directors will be notified of all suspensions lasting longer than three days. In all instances of suspensions, parents or guardians will be informed via phone and letter stating the incident and duration of suspension. The students' family would be required to attend an in-person conference with a member of the school leadership team before the student would be allowed to return to school. Causes of suspension are outlined above in **Figure 8.3**. For escalated behaviors, in-school-suspension is the preferred option over out of school time. Should a student display behavior that warrants an out-of-school suspension, that student will still be required to make complete any missed assignments, presentations, or exams in a timeframe reflective of the length of the suspension.

**Expulsions.** Indiana law (Indiana Code – Section 20-33-8-19) provides the Executive Director with the authority to expel students without Board involvement for the following behaviors (Indiana Code – Section

20-33-8-14): student misconduct and substantial disobedience. Vanguard Collegiate deems the following behaviors consideration for expulsion: Fighting/violent behavior resulting in serious injury or with the use of a weapon; Assault and battery against a school community member; Possession of a weapon or explosive device of any kind; and Possession, use, or distribution of illegal or unauthorized prescription drugs.

**Appeals.** A family whose student is expelled under the due process under Indiana state law, has an opportunity to appeal the initial decision made by the school (subject to legal review and Board approval):

- Written notification of expulsion to the parent/guardian within 24 hours
- Families have five (5) days to file an appeal orally or in writing within five (5) days of receipt of the notice of expulsion
- Absent a timely request for appeal, the decision of the Executive Director will be final.
- Appeal filed with the Board of Directors with a hearing to be held no later than 10 days after the beginning of the expulsion.
- The Board of Directors decide (upholding or dismissing).
- The Board of Directors decision is final.

**Notification.** Prior to school starting, at each in-home conference, families will review, discuss, and sign the school discipline policy. Weekly throughout the school year, students and parents will receive student behavior reports that will include dollars earned, dollars deducted, rationale and teacher initials for both, the cumulative amount of dollars, and an attached note indicating correction action to be taken or rewards to be received. Based upon the content of these reports, parents will receive a positive phone call from school leadership and/or a teacher. Additionally, should a student exceed the threshold for total dollars lost in the timespan, then a mandatory conference involving the student, parent, teacher, and a member of the school leadership team will take place. Students may also be assigned detention. Parents of a student who is placed on suspension and/or expelled will be notified prior to the start of the suspension and must attend a conference prior to the student's return.

**Discipline and Special Education Students.** In the case of a special education student, or a student who receives 504 accommodations, Vanguard Collegiate will ensure that it makes the necessary adjustments to comply with the mandates of State and federal laws, including the IDEA and Section 504 of the Rehabilitation Plan of 1973, regarding the discipline of students with disabilities. Prior to recommending expulsion for a Section 504 student or special education student, the Executive Director will convene a review committee to determine whether the student's misconduct was a manifestation of his or her disability; whether the student was appropriately placed and receiving the appropriate services at the time of the misconduct; and/or whether behavior intervention strategies were in effect and consistent with the student's IEP or 504 Plan. If it is determined that the student's misconduct was not a manifestation of his or her disability, that the student was appropriately placed and was receiving appropriate services at the time of the misconduct, and that the behavior intervention strategies were in effect and consistent with the students IEP, the student may be expelled.

**Appealing an Expulsion.** A student who is expelled will be subject to due process under Indiana state law. At Vanguard Collegiate, that due process will be as follows (subject to legal review and Board approval):

- The Executive Director will give written or actual notice of the expulsion to the parent/guardian within 24 hours, including giving notice that the parent/guardian or student has five (5) days to file an appeal.
- All appeals must be filed, orally or in writing, within five (5) days after receipt of the notice of expulsion.
- The parent/guardian, the student or a teacher requested by the student can appeal the decision.
- Absent a timely request for appeal, the decision of the Executive Director will be final.
- The appeal will be filed with the Governing Board of Directors. The hearing will be held no later

than 10 days after the beginning of the expulsion. Notice of the time and place of the hearing will be provided to the parent/guardian, the student, the Executive Director and a teacher who chooses to file an appeal.

- The Governing Board of Directors may affirm the decision of the Executive Director, order removal of the expulsion unconditionally or upon such terms and conditions as it deems reasonable. The action of the Governing Board of Directors is final.



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**Attachment 9**  
**Evidence of Support from**  
**Community Partners**

**Attachment 9: Provide evidence of demand from the community, evidence of community engagement, and evidence of support from community partners, which should include a summary of the following:**

- a. Documentation of public forums held
- b. Meetings with community leaders (e.g., mayors, council members, neighborhood leaders)
- c. Letters of intent and/or memoranda of understanding
- d. Specific resources to be committed or contributed from partner(s)
- e. A detailed plan to accomplish successful community engagement during the school’s pre-opening period and leading into the school’s first year.

Since August of 2016, Vanguard Collegiate’s founding team has worked to connect with the community in the Haughville and the city of Indianapolis at large. **Figure 9.1** displays the community events we have attended/participated in, as well as, the community members we met with to discuss our proposed school and our vision for this community’s students.

**Figure 9.1: Community Engagement Meetings – Evidence of Community Demand**

Community Member Engagement		
Name	Organization	Date
Representative Bob Behning	Indiana House of Representatives	7/25/17
Dr. Scott Berkopes	Indiana University Purdue University Indianapolis	7/5/17
Scott Bess	Purdue Polytechnic High School	7/6/17
Barrato Britt	EDFit	11/2/16
Brandon Brown	Mindtrust	3/29/17
Acey Byrd	100 Black Men of America	7/21/17
Mathew Butler	Indiana House of Representatives	7/6/17
Amy Mary Chalmers	Indianapolis Neighborhood Resource Center (INRC)	2/20/17
Mary Clark	International Marketplace Coalition	6/9/17
Alicia Collins	Central Indiana Community Foundation	6/23/17
Amy Conrad-Warner	Indiana University Purdue University Indianapolis	2/10/17
Pastor Ronald Covington	Friendship Baptist Church	8/17/17
Brian Dinkins	Providence Cristo Rey High School	7/27/17
Myron Duff	Indiana University Purdue University Indianapolis	3/2/17
James Duke	Indiana University Health	2/14/17
Emory Edwards	EDFit	9/13/16
Ashley Ford	Indianapolis Public School	7/13/17
Jackie Gantzer	Mindtrust	4/11/17
Melvin Graham	Made by Munsters	9/21/16
Jim Grimm	Indiana University Purdue University Indianapolis	2/7/17
Julian Harrell	Faegre Baker Daniels	9/13/16
Mark Hazelgrove	Teach for America – Indianapolis	7/19/17
Martha Henn	River West Great Place & Near West Quality of Life Convener	11/21/16
Manny Herceg	Lewis Kappes/Taft Law	10/28/16
Kristen Hines	Mindtrust	5/30/17
Tremayne Horne	Indianapolis Children’s Museum	11/21/16
Mali Jeffers	Mosaic City	9/20/16
Clete Ladd	Kindezi Academy	2/13/17
Christina Lear	Indianapolis Metropolitan High School	6/28/17

Senator David Long	Indiana State Senate	7/6/17
Jeff Lozer	Marian University	8/21/17
Nancy Mobley	Haughville Public Library	2/15/17
Representative Justin Moed	Indian House of Representatives	2/15/17
Aleanya Moore	Ladies Under Construction Mentoring Program	6/28/17
Ruth Morales	Mayor's Office	2/6/17
Steven Morris	Hawthorne Neighborhood Association	12/28/16
Elizabeth Odle	Mary Riggs Center	3/9/17
Adrienne Opp	Hawthorne Neighborhood Association	2/10/17
Vop Osili	City-County Council Member	12/1/16
John Otteson	Chase Bank	11/29/16
Lauren Peterson	Enroll Indy	5/22/17
Brandon Randall	VOICES Corp.	6/19/17
Ruth Rivera	Indiana Legislative Services	1/23/17
Vicki Rubio	Public Allies	3/7/17
Derrin Slack	ProAct	6/22/17
Adrienne Slash	Leadership Indianapolis	9/19/16
Yuri Smith	Goodwill Industries/Global Prep Academy	11/3/16
Senator Greg Taylor	Indiana State Senate	3/7/17
Alexis Thomas	Indianapolis Leadership Educational Equity	3/1/17
Pitt Thompson	Christamore House	6/29/17
Phil Votaw	Westside Community Development Corporation	11/21/17
Joe White	Mindtrust	5/1/17
Marshawn Wolley	Indiana University Purdue University Indianapolis	9/13/16
Ahmed Young	Mayor of Indianapolis Office of Education Innovation	6/23/17
Raymond Young	Horizon Planning Group	9/22/16

<b>Events</b>		
<b>Name</b>	<b>Organization</b>	<b>Date</b>
Membership Meeting	100 Black Men of Indianapolis	9/10/17
Get on Board	Leadership Indianapolis	9/28/16
Mayor's Office Neighborhood of the Month Celebration	Hawthorne Neighborhood Association	12/28/16
Neighborhood Association Meeting	We Care Neighborhood Association	11/21/16
Monthly Meeting	Westside Educational Task Force	2/22/17
TRU Dialogue: A Youth-led Forum	The Bloom Project	2/24/17
Taste of the Westside	George Washington High School Fundraiser	2/24/17
The Exchange Monthly Meeting	Indianapolis Urban League	3/6/17
Monthly Meeting	Near West Neighborhood Collaborative	4/12/17
Reignition Breakfast	21 <sup>st</sup> Century Urban School Leaders	6/3/17
Southwest District Community Day	Indianapolis Metropolitan Police Department	6/8/17
ReadUP	United Way of Central Indiana/Christamore House	6/8/17, 6/14/17, 6/28/17, 7/5/17

2017 Kappa League Meeting	Kappa Alpha Psi Fraternity Inc. – Indianapolis Alumni Chapter	6/10/17
2017 Charter School Conference	Network for Quality Education	6/27/17
Community Canvassing	Vanguard Collegiate	7/11/17, 7/25/17 8/19/17
Community and Fraternity Expo	New Boy	7/12/17
Education Conference	Indiana Black Expo	7/13/17
Summer Celebration (canvassing)	Indianapolis Black Expo	7/16/17
Back to School Carnival	Indianapolis Metropolitan High School	7/19/17
Back to School Rally	Indianapolis Urban League	7/22/17
Parent Information Session	Vanguard Collegiate	7/22/17, 8/12/17
Radio Appearance	Grey Area Radio Show	7/27/17
Presidents’ Conference	100 Black Men of America	8/5/17
A2Z Back to School Rally – Parent Panel	Alpha Phi Alpha Fraternity	8/5/17

**Community Engagement Plan.** Upon authorization, Vanguard Collegiate will continue community engagement through **tabling** events where staff members and volunteers share information regarding Vanguard Collegiate at local organizations and businesses, **canvassing** events both throughout high traffic areas of the community and door-to-door, and attendance at **Community Events** in the targeted neighborhood. This community engagement commenced in the spring of 2017. Additionally, Vanguard Collegiate of Indianapolis will have a broad marketing approach to ensuring we are able to reach as many families and community members as possible. We will make appearances on local radio, take out advertisements in local newspapers and other print publications, and establish a strong social media presence. The goal is to build a network of supporters, including families within the 46222 zip code. **Figure 9.2** outlines our community engagement plan through the start of Year 1.

**Figure 9.2: Community Engagement**

Target Group	Activities
Parents	Canvassing the neighborhood; Social Media; Earned/Paid Media; Tabling; Search Engine Optimization; Strategic Partnerships (ex. – Enroll Indy)
Students	Volunteerism (ex. – ReadUP, Sports Leagues, etc.); Social Media; Tabling Marketing collateral (ex. – bags, water bottles, shirts, etc.)
Community Members	Canvassing the neighborhood; Social Media; Earned/Paid Media; Tabling; Search Engine Optimization; Volunteerism (ex. – churches, food banks, special events, etc.) Marketing collateral (ex. – yard signs, flyers, etc.)
Community Organizations	Volunteerism; Earned/Paid Media; Tabling; Search Engine Optimization; Special Events
Funders	Open Houses; Earned/Paid Media; Marketing collateral (ex. – yard signs, flyers, etc.); Internally-created Special Events; Marketing Collateral
Board Prospects	Social Media; Tabling; Search Engine Optimization; Special Events

Vanguard Collegiate is expected to go live with our website, [www.vcindy.org](http://www.vcindy.org) in September 2017; make another appearance on Grey Area Radio Show in October 2017; to tables at several churches in the area in October, November and December of 2017; and to co-host a Back-to-School Rally (in conjunction with

Alpha Phi Alpha Fraternity, Inc., Kappa Alpha Psi Fraternity, Inc. and Christamore House) in January of 2018. We will continue to canvass at a minimum of three (3) times per month both within and outside of the target neighborhood. We will remain active members of the respective neighborhood organizations we are engaged with already. Lastly, we will volunteer with ReadUP and The Exchange at the Indianapolis Urban League as close to the neighborhood as possible.

**Letters of Support.** Vanguard Collegiate has 26 received letters in support of the proposed school from a number of local leaders and business, attached below. Of those, we have begun building partnerships to execute upon authorization with Christamore House, Bloom Project, Big Brothers Big Sisters of Central Indianapolis, Adult&child Health, and EdFit.



**STATE OF INDIANA  
HOUSE OF REPRESENTATIVES**

Robert Behning  
200 W. Washington St.  
Indianapolis, IN 46204  
Website: [www.in.gov/h91](http://www.in.gov/h91)  
E-Mail: [h91@in.gov](mailto:h91@in.gov)

---

**COMMITTEES:**  
Education, Chairman  
Public Health  
Utilities and Energy

August 30, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear James,

I would like to take this opportunity to express my support for a new charter school seeking to open in Indianapolis. I believe Vanguard Collegiate of Indianapolis will provide a valuable educational option to families in an underserved area of the city looking to prepare their children early in their academic track for both college and a career.

Having met with Mr. Robert Marshall, we discussed at length his vision for Vanguard Collegiate. I was especially impressed with his emphasis on teaching and instilling civic mindedness, strong character, and critical thinking skills. His carefully-planned curriculum intends to build leaders in thought, word, and action. I think these are core values that are essential to lifelong success.

During our discussion, it was also quite evident Mr. Marshall had thoroughly researched his target community as well as considered the various challenges (and opportunities) of serving the Near Westside of Indianapolis. Not only does this region of the city have few choice options for middle schoolers, it has struggled with educational attainment. Incorporating community service and projects, Vanguard Collegiate's curriculum looks to embrace not only its families but the wider community in which it serves. High expectations and experiential learning should provide a novel avenue in which to reach many struggling students and convince them of their potential for academic success. In this regard the school's mission is both inspiring and imperative for the greater prosperity of our state and nation: Reaching at-risk students before it's too late and breaking the cycle of multigenerational poverty.

Thank you for your consideration of this letter, and for your work in authorizing high-quality charter schools that provide valuable educational options to Hoosier families. If you have any questions regarding my support for Vanguard Collegiate's application, please do not hesitate to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Behning", written over a horizontal line.

Robert Behning  
State Representative  
House District 91

RB:db

# State of Indiana

# Senate

Senator David C. Long  
President Pro Tempore  
7100 West Jefferson Blvd.  
Fort Wayne, Indiana 46804

Committees:  
Rules and Legislative Procedure, Chair  
Joint Rules, ex officio

Business (260) 436-7100  
State House (800) 382-9467  
Email: [s16@in.gov](mailto:s16@in.gov)

August 18, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear Mr. Betley,

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed college-preparatory that will serve students and families of northwest Indianapolis. After speaking with Mr. Robert Marshall about this proposal, I am confident the school will be of great value to the surrounding community and to the State of Indiana. The leadership team for Vanguard Collegiate has the tools and skills necessary to keep this school focused on student achievement; I have no doubt they will remain committed to this community for many years to come.

Vanguard Collegiate of Indianapolis is deserving of the Charter School Board's time and attention. Thank you for your consideration of this letter of support.

Sincerely,



Senator David C. Long  
President Pro Tempore

DCL



August 8, 2017

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, tuition-free, college-preparatory, 5-8 school for the students and families of Indianapolis' Near Northwest side.

Through rigorous curriculum and high-quality instruction, provided within an invested and ambitious school community, Vanguard Collegiate will prepare all students in grades five through eight to thrive in high school and graduate from the college of their choice. The school is designed to help all students achieve academic success and to prepare them for the rigors of college. As C.E.O. of Christamore House, I support Vanguard Collegiate as an educational option for families who reside in Haughville and its surrounding areas.

Additionally, I support the leadership of proposed School Leader, Robert Marshall. I have known him for years. I can attest to his commitment to founding and leading a game-changing school for students and families of Indy's Near Northwest side. His experience, training, vision for the school, passion, and experience in urban settings make him uniquely qualified to lead Vanguard Collegiate.

Over the past few months, Vanguard Collegiate's founding team has worked to connect with the community in the Haughville and the city at large. Their work has already set the stage for even more support from the communities they will serve.

Again, I support Vanguard Collegiate as a high-quality educational option. It is my hope that the school will be granted a charter to open in August 2018. If you have any questions, please do not hesitate to contact me.

Sincerely,

Pitt Thompson  
C.E.O.  
Christamore House



EdTec, Inc.  
National Office  
1410-A 62<sup>nd</sup> Street  
Emeryville, CA 94608

September 4, 2017

Indiana Charter School Board  
143 West Market Street, Suite 400  
Indianapolis, IN 46204

Dear Members of the Indiana Charter School Board:

On behalf of EdTec, I am writing to express our strong support for the approval and opening of the proposed Vanguard Collegiate of Indianapolis.

EdTec ([www.edtec.com](http://www.edtec.com)) is a social venture founded in 2001 to develop, support, and advance high quality charter schools. Through our back-office service practice and consulting services in finance, operations, facilities, and student information, we have helped support over 400 charter schools, charter management organizations, and charter school support organizations across eleven states including Indiana. EdTec is a highly respected, deeply experienced firm within the national charter school community.

Strong financial and operational systems, in addition to a strong educational program, are fundamental to a high quality charter school. At EdTec, we believe that students deserve to attend charter schools that are not only educationally sound, but financially and operationally sound as well. At times, however, these three objectives may seem diametrically opposed. So, we see EdTec as a critical thought partner for our client schools to find and facilitate the right balance across these three objectives.

In our work on this application with Robert Marshall, lead founder, as well as members of the Founding Board of Vanguard Collegiate, we have observed a group of individuals who understand this balance quite well. We have had the opportunity to work together on a strategic budget and financial plan that is prudent and realistic, and at the same time recognizes the very important and resource intensive work of providing the families of Indianapolis with a very high quality middle school educational option. Our extensive work in the charter school community gives us the unique perspective on who is likely to be successful. Our experience with the Vanguard Collegiate team thus far assures us they will be a successful charter school and should be approved.

EdTec has proposed to continue working with Vanguard Collegiate if approved by providing startup and operating year financial services and consulting through June 2019. And, it is our hope that the relationship with EdTec will continue beyond this timeframe.

We strongly support the approval and opening of Vanguard Collegiate. We are confident that the individuals involved, along with the plans developed and proposed partnerships, will provide the future students and families of Vanguard Collegiate with a high quality middle school education option.

Sincerely,

A handwritten signature in cursive script that reads "Gasper Magallanes".

Gasper Magallanes  
Sr. Director, Client Management & Development  
EdTec, Inc.  
[gasper@edtec.com](mailto:gasper@edtec.com)  
646-538-8232



08/21/2017

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, tuition-free, college-preparatory, 5-8 school for the students and families of Indianapolis' Near Northwest side.

Through rigorous curriculum and high-quality instruction, provided within an invested and ambitious school community, Vanguard Collegiate will prepare all students in grades five through eight to thrive in high school and graduate from the college of their choice. The school is designed to help all students achieve academic success and to prepare them for the rigors of college. As Program Manager of the VOICES Corp Day Reporting program, I support Vanguard Collegiate as an educational option for families who reside in Haughville and its surrounding areas.

Additionally, I support the leadership of proposed School Leader, Robert Marshall. I have known him for five years. I can attest to his commitment to founding and leading a game-changing school for students and families of Indy's Near Northwest side. His experience, training, vision for the school, passion, and experience in urban settings make him uniquely qualified to lead Vanguard Collegiate.

Over the past few months, Vanguard Collegiate's founding team has worked to connect with the community in the Haughville and the city at large. Their work has already set the stage for even more support from the communities they will serve.

Again, I support Vanguard Collegiate as a high-quality educational option. It is my hope that the school will be granted a charter to open in August 2018. If you have any questions, please do not hesitate to contact me.

Sincerely,

Brandon Randall  
Day Reporting Program Manager  
VOICES Corp



8/7/17

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, tuition-free, college-preparatory, 5-8 school for the students and families of Indianapolis' Near Northwest side.

I have known Robert Marshall for over 25 years. I met Robert at Mount Zion Baptist Church. Growing up, I have always known that Robert would end up a remarkable person giving back to his community. He volunteered for many events around our church and the surrounding Indianapolis Area. When he went away to Morehouse College, I knew the he was heading in the direction to conquer the world even more.

Years later we reconnected when he reached out stating that he was now the Director at the Lilly Boys and Girls Club located in Indianapolis. The love and passion that he had for the kids and the way he interacted with each one made a parent and that particular child realize how much he wanted to be a positive influence and see them grow as an individual. He put his heart and soul in building up the Lilly Boys and Girls Club by finding a plethora of opportunities within the community (and outside of the city) to make sure each child reached their full potential; rather than helping them with mental, physical, and interpersonal skills. Once Robert left the Lilly Boys and Girls Club, not only was I devastated, but so were my girls who had also attended the club. I had to realize that another great opportunity was ready for him to take advantage of as a Senior Director of Programs at the Center for Leadership Development and I could not have been happier for him.

Robert Marshall is definitely a man of substance, drive, and has a passion for helping others more than himself. His strong work ethic, combined with his character, and sensitivity to the needs of others all combine to create the potential for a wonderful role model for the children. Any opportunity he has been given, he has always put his best foot forward and has made a lasting impression on those that he has impacted throughout his life and theirs.

Again, I support Vanguard Collegiate as a high-quality educational option.

Sincerely,

Latresha Robertson

Team Lead for Provider Data Management-MHS Indiana



**Big Brothers Big Sisters**  
of Central Indiana

2960 North Meridian Street  
Suite 150  
Indianapolis, IN 46208

317.921.2201  
317.921.2202 (fax)

[www.bebigforkids.org](http://www.bebigforkids.org)

March 23, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear Mr. Betley,

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, tuition-free, college-preparatory, 5-8 school for the students and families of Indianapolis' Near Northwest side.

Through rigorous curriculum and high-quality instruction, provided within an invested and ambitious school community, Vanguard Collegiate will prepare all students in grades five through eight to thrive in high school and graduate from the college of their choice. The school is designed to help all students achieve academic success and to prepare them for the rigors of college. As the Chief Program Officer of Big Brothers Big Sisters of Central Indiana, I support Vanguard Collegiate as an educational option for families who reside in Haughville and its surrounding areas.

Additionally, I support the leadership of proposed School Leader, Robert Marshall. I have known Mr. Marshall for the past several years in his capacity at the Center for Leadership Development. Through his partnership with our agency, we were able to provide our mentor matches the opportunity to learn and grow from him and his staff. He understands the importance of education and is excited to share it with others.

Although our agency serves families throughout Marion County, 42208 and 46222 are two of our focus areas for service. Having another strong partner in the neighborhood, like Vanguard Collegiate, to provide additional opportunities and support to our families, would be a welcomed benefit.

Again, I support Vanguard Collegiate as a high-quality educational option. It is my hope that the school will be granted a charter to open in August 2018. If you have any questions, please do not hesitate to contact me.

Sincerely,

Amy Pomeranz Essley, MSW, MPA  
Chief Program Officer  
[aessley@bbbbsci.org](mailto:aessley@bbbbsci.org)  
317-472-3726



United Way agency

Think of the possibilities. **What will you start?**

**start something™**

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

Mr. Betley:

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, college-preparatory, serving the students and families of Indianapolis' Near Northwest side.

Vanguard Collegiate of Indianapolis seeks to empower and equip students to be successful in present and future phases of life. Vanguard Collegiate is poised to create a safe and positive learning environment that will prove to be academically challenging and community enriching. The school's values of Growth, Endurance, Discipline, Mastery, Integrity, Critical Thinking and Responsibility not only speak to a place of learning but instill key values that will aid in continued success upon leaving the school. With a rigorous curriculum and high-quality instruction, Vanguard Collegiate will prepare all students in grades five through eight to thrive in high school as well as attend and graduate college. As a Therapeutic Care Specialist with Adult and Child Health, I work with students daily who would benefit from the structure, discipline and direction the school is heading. It is because of these values and principles that I support Vanguard Collegiate as an educational option for families who reside on the Near Northwest side of Indianapolis.

Additionally, I support the leadership of proposed School Leader, Robert Marshall. I have known him for 20 years. I can attest to his commitment to founding and leading a school for students and families of Indy's Near Northwest side. Robert is dedicated to the success of young people and has a desire to see all young people fully educated and afforded similar academic experiences. Robert sets the bar high for his students and staff and aids them in reaching the expectation. His experience, training, vision for the school, passion, and experience in urban settings make him uniquely qualified to lead Vanguard Collegiate.

Again, I support Vanguard Collegiate as a high-quality educational option. It is my hope that the school will be granted a charter to open in August 2018. If you have any questions, please do not hesitate to contact me.

Sincerely,



Rev. Anita M. Cobb  
Therapeutic Care Specialist  
Adult and Child Health



## INDIANA UNIVERSITY FOUNDATION

3/20/2017

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am enthusiastic and humbled to be writing a letter of support for Robert Marshall as he embarks on his mission to make a transformative impact on the Near Northwest Side community through his tuition-free, collegiate-preparatory school, Vanguard Collegiate of Indianapolis.

I am confident that through Robert's leadership, all students from Vanguard Collegiate will not only graduate from college, but also achieve in every field of human endeavor. Vanguard Collegiate will indeed help close the achievement gap by thoroughly helping students attain academic success while also preparing them for the rigors of college life. As the Senior Associate Director of Regional Development at the Indiana University Foundation, I give Robert Marshall and Vanguard Collegiate my unwavering support as an educational option for scholars who reside in Haughville and its surrounding areas.

Additionally, I have known Robert for 20 years, and I am excited that he will bring the leadership that he displayed at the Center for Leadership Development, Boys and Girls Club, and the 100 Black Men to the youth of the Near Northwest Side community. His unique background and approach will certainly be impactful and game-changing to the scholars of Vanguard Collegiate.

Again, I support Vanguard Collegiate as a high-quality educational option, and it is my hope that the school will be given the opportunity to open in August 2018. If you have any questions, please do not hesitate to contact me at [nicawill@iu.edu](mailto:nicawill@iu.edu). Thank you.

Sincerely,

Nickolas Williams  
Senior Associate Director of Regional Development  
Indiana University Foundation  
[nicawill@iu.edu](mailto:nicawill@iu.edu)  
317-809-6838

**FOR ALL**

The Indiana University **Bicentennial Campaign**



## Indiana University Health

March 10, 2017

To Whom It May Concern:

My name is James Duke and I am writing this letter to support Robert Marshall, who I have known since he was in high school. I am also supportive of the charter application for Vanguard Collegiate of Indianapolis, a proposed public charter school in Indianapolis, IN.

I first met Robert when I worked for The Center for Leadership Development, Inc. The mission of the Center for Leadership Development is to foster the advancement of minority youth in Central Indiana as future professional, business and community leaders by providing experiences that encourage personal development and educational attainment. As a student in High School, he had strong aspirations of going to college and being a leader in his community. Robert focused on CLD's Principles of Success which are Character Development, Education Excellence, leadership Effectiveness, Community Service and Career Achievement.

I have watched Robert grow in maturity and civically as he matriculated through college, career and community involvement. He has always had a passion for giving back to his community through youth involvement and education. Be it in formal panel discussions or informal dialog among friends, Robert makes no apologies for strongly advocating for youth education and excellence!

As a Board Member of The 100 Black Men of Indianapolis, I immediately noticed a fire had been ignited when Robert was hired to lead our efforts in our public schools to narrow the gap of achievement for our elementary and middle school males in our Team Mentoring Program. That fire quickly spread and evolved into an obvious path to where he is now.

I was not surprised when I found out that Robert was accepted as a Building Excellent Schools (BES) Fellow. That falls right in line with the strategic course he has taken. I am familiar with the reputation of BES and the support of this organization will be critical to Robert's success as he opens Vanguard Collegiate of Indianapolis. I see Vanguard's potential as a leader and example of Discipline, Strategic Thinking and Quality Instruction. Indianapolis definitely needs strong sources of quality education for our students and I feel the Robert has the vision and capability to make that happen with Vanguard. The west side of Indianapolis will be blessed to have an educational institution like Vanguard Collegiate of Indianapolis to make quality education available to the community.

Feel free to contact me if you have any additional questions. I can be reached at [jduke4@iuhealth.org](mailto:jduke4@iuhealth.org) or 317-250-7444.

Regards,

James A. Duke, Program Director, Supplier Diversity, IU Health



To Whom It May Concern,

I am writing this letter in strong support of charter application for Vanguard Collegiate of Indianapolis, a proposed 5<sup>th</sup> – 8<sup>th</sup> grade charter school in Indianapolis. I am also highly supportive of the proposed school's leader, Robert Marshall, and his commitment to making a difference for minority and under-served youth in Indianapolis.

I have had the pleasure of directly working with Mr. Marshall in numerous environments over the past 10 years and I have seen the passion and vision he has for working youth in the community. Through his leadership positions with 100 Black Men of Indianapolis, the Boys & Girls Club of Indianapolis, and the Center for Leadership Development, Mr. Marshall has developed programs and curricula to empower students to enact change in their community. Through his BES Fellowship, Mr. Marshall has analyzed over 30 high performing charter schools across the nation and has gained the tools and knowledge to successfully build and lead Vanguard Collegiate.

Vanguard Collegiate of Indianapolis exists to achieve its mission of instilling in its scholars the desire to dream big, the discipline to work hard, and the ability to think critically to achieve school and life success. Vanguard Collegiate will ensure that scholars are equipped for post-secondary and subsequent life success regardless of their race, socio-economic status, family educational level attainment, or zip code.

I am incredibly excited to support the charter application of Vanguard Collegiate and I look forward to the profound impact that Mr. Marshall and Vanguard Collegiate will have on students that become a part of its immediate community. I close this letter with great hope and desire that Vanguard Collegiate is granted a charter and open in the fall of 2018.

Sincerely

Emory Edwards  
EdFit Indiana, Inc.  
317.491.0420



FREEDOM PREPARATORY  
ACADEMY

Shelby County Schools:  
Office of Charter Schools  
995 S. Lauderdale  
Memphis, TN 38126

To Whom It May Concern,

I am writing this letter in strong support of Vanguard Collegiate of Indianapolis Charter School, a proposed 5 through 8 college-preparatory school for the students and families of Indianapolis. I am confident Vanguard Collegiate will serve students in communities that do not have access to many excellent educational opportunities.

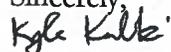
My name is Kyle Kucharski, and I am currently the Head of School at Freedom Preparatory Academy Middle School (Freedom Prep). In my work of serving students in Memphis, I recognize the critical importance of having high-quality educational options. Vanguard Collegiate meets all of those requirements, and it has dedicated an incredible amount of time to partnering with the community to ensure it will have the backing of Indianapolis' stakeholders throughout the city.

The mission of Vanguard Collegiate is to set the bar high, academically and behaviorally, instilling in every 5th through 8th grade scholar the desire to dream big, the discipline to work hard, and the ability to think critically to achieve school and life success. The school will provide students with an outstanding foundation of the academic and life skills necessary to succeed in today's world.

I also support the leadership of proposed Head of School, Robert Marshall. His commitment to create and sustain a leading college preparatory school for the students of Indianapolis is clear. During his Building Excellent School residency here at Freedom Prep earlier this year, he has shared his vision for the school, and I was impressed by both his passion for his city and his experience in urban education. He espouses a need to partner with families to ensure that everyone in Indianapolis has access to the rich opportunities your community has to offer. We hope to work with the school as a partner in the future as we invest in the development and education of youth.

Again, I would like to extend my support and recommendation for Vanguard Collegiate. It will be a school that brings both high academic standards and high levels of support to allow students to achieve at those high levels. It is my great hope that Vanguard Collegiate of Indianapolis will be granted a charter and open in the Fall of 2018.

If you have any questions or concerns, please do not hesitate to contact me at [kkucharski@freedomprep.org](mailto:kkucharski@freedomprep.org) or call me at 901-493-2533

Sincerely,  
  
Kyle Kucharski  
Head of School- Middle School  
Freedom Preparatory Academy Charter Schools

EDUCATION IS FREEDOM



March 6, 2017

Dear Indiana Charter School Board:

It is with confidence that I support Robert Marshall and the charter application for Vanguard Collegiate of Indianapolis Charter School.

Over the last eight months I have worked closely with Robert and have observed first-hand the many strengths he brings to this work. Robert is an experienced leader bringing a wealth of knowledge to this role in education, fully understands the work ahead, is prepared to do what is necessary to lead a high-performing urban charter school for students in Indianapolis.

Building Excellent Schools (BES) is a highly selective, nationally recognized non-profit whose flagship program, the Building Excellent Schools Fellowship, prepares outstanding candidates for urban charter school leadership. Robert brings experience in non-profit leadership, and urban youth development to this work. He will also bring the experience of two month-long Residencies in high performing charter schools. Robert completed his first Residency this past January at Freedom Preparatory Academy in Memphis, TN. Through this residency, Robert was able to plan curriculum, had exposure to strong leadership and leadership practices, as well as was able to participate in well-executed professional development for staff.

Robert has worked diligently and thoughtfully as he has approached building support for the proposed school, including the assembly and training of a diverse and accomplished founding team.

As the founder and former Head of School of Excel Academy Charter School in Chelsea, MA, I understand first-hand the high bar on must hold to found and lead a high-performing school. Robert brings a deep commitment to the students and families of Indianapolis and a vision for a high bar of excellence, which will drive the charge as he works towards building Vanguard Collegiate.

We are honored to work with Robert and have confidence that his prior experience and the well-researched and practice-proven components of the public charter school design for Vanguard Collegiate will lead to strong student achievement for the children of Indianapolis.

Respectfully,

*Stephanie Patton*

Stephanie Patton, Associate Director, The Fellowship

Building Excellent Schools

spatton@buildingexcellentschools.org 617-227-4545 x210



March 17, 2017

To Whom It May Concern:

I am enthusiastic to support Robert Marshall's application to open Vanguard Collegiate of Indianapolis, a high performing charter school. My current experience supporting him as a Director of Leadership Development with Building Excellent Schools has given me the opportunity see the high standard Robert sets for students and educators. My prior experience both as a school leader myself and as a Chief Academic Officer managing school leaders allows me to speak confidently about Robert's ability to recognize and develop quality instructional practices and hire and retain an exceptional team for the critical and urgent work of teaching students.

During my five years as a Chief Academic Officer I worked with five schools at all stages of growth. I've seen that unfettered passion for students is necessary but not sufficient. Passion must be alongside pedagogical knowledge of instruction, organized attention to details, and an inspirational ability to lead others. Robert has an unwavering optimism along with a reverent and practical understanding of the obstacles he must lead others through. Not only have I had the opportunities to see these characteristics in action while Robert has been a Building Excellent Schools Fellow, but his success in prior leadership roles proves he's capable of opening a world-class school.

It is without hesitation that I recommend Robert Marshall. His commitment to Indianapolis, his passion for students, and his unrelenting drive for the success of his students will make you enthused to have him create a school in Indianapolis.

Respectfully,

A handwritten signature in black ink, appearing to read "LVDW", followed by a long horizontal line extending to the right.

Luke Van De Walle

Director of Leadership Development, Building Excellent Schools

# THE CENTER FOR THE PERFORMING ARTS

Jeffrey C. McDermott, Interim President/CEO Michael Feinstein, Artistic Director  
355 City Center Drive Carmel, IN 46032 P 317.843.3800 F 317.660.3374 TheCenterPresents.org

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Mr. Betley,

I am writing to offer my support for Robert Marshall and Vanguard Collegiate of Indianapolis. I have known Mr. Marshall for nine years and worked closely with him for two years during our time together at 100 Black Men of Indianapolis. I served as the Director of Development and Mr. Marshall served as the Director of Programs. We worked side by side to evaluate and improve programs so that we could secure sustainable funding.

I continued to work with Mr. Marshall to bring the students from the Boys & Girls Club of Indianapolis to performances at the Center for the Performing Arts and to place students from the Center for Leadership Development in internships in arts administration. We both share the belief that the arts are important for youth to experience. Even stepping outside their neighborhood to tour a magnificent building like the Palladium can be life changing for many students.

There are few people I have encountered in my career that I would trust to create a school from the ground up. Mr. Marshall has what it takes to be successful in this endeavor. He possesses a unique combination of the passion to help youth succeed, knowledge of best practices and experience in the field, extensive relationships in the community he serves, and the motivation to innovate.

I highly recommend Vanguard Collegiate for consideration as a charter school in Indiana and would be thrilled to welcome their students to the Center for the Performing Arts.

Sincerely,



Emily Meaux Lovison, MPA  
Director of Development  
The Center for the Performing Arts





**Strengthening  
nonprofits and  
the communities  
they serve.**

*Sharing a mission of change*

**Illinois**

333 South Wabash Ave.  
Suite 2800  
Chicago, IL 60604  
312 629 0060

March 22, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

**Indiana**

The Platform  
202 East Market St.  
Indianapolis, IN 46204  
317 860 6900

Mr. Betley,  
This letter confirms IFF’s commitment to partner with Vanguard Collegiate as they open their first school in Indianapolis.

**Michigan**

3011 West Grand Blvd.  
Suite 1715  
Detroit, MI 48202  
313 309 7825

IFF is a mission-driven lender, real estate consultant, and developer that helps communities thrive by creating opportunities for low-income communities and people with disabilities. Through a Walton Family Foundation grant, IFF is able to provide a range of grant-funded services to schools like Vanguard Collegiate to ensure these schools have the tools and resources necessary to launch quality schools.

**Minnesota**

527 Marquette Ave.  
Suite 1150  
Minneapolis, MN 55402  
612 814 0310

We are excited to partner with Vanguard Collegiate in the process of securing a sustainable facility. Our partnership started last year when we completed the first phase of facility feasibility analysis, including a space needs analysis, market and demographics analysis, and evaluation of financing scenarios. Upon receipt of authorization, IFF will advise on lease negotiations, assess facility conditions and propose build-out scenarios for private facilities. We will further engage them in providing due diligence and owner's representation services as they work to secure their permanent site.

**Missouri**

911 Washington Ave.  
Suite 203  
St. Louis, MO 63101  
314 588 8840

We look forward to partnering with Mr. Marshall of Vanguard Collegiate to increase the quality of educational opportunities for students in Indianapolis.

**Ohio**

500 South Front St.  
Suite 125  
Columbus, OH 43215  
614 484 1811

Sincerely,

Nate Lichti  
Director of Real Estate Services – Indiana  
IFF

**Wisconsin**

215 North Water St.  
Suite 225  
Milwaukee, WI 53202  
414 563 1100



**JESUS EXALTED + WORD EXPLAINED**  
**EASTERN STAR CHURCH**

March 6, 2017

To whom it may concern:

We are writing this letter in support of Robert Marshall, Jr. as a capable and competent professional. We have worked with him as a senior leader on programming for children, youth and young adults. He demonstrated excellence and diligence in his practices and was a willing and cooperative team player.

Based on his prior professional practices we trust that he will continue his leadership with Vanguard Collegiate of Indianapolis. We are a multi-site church with campuses located in east and western Marion county and look forward to future opportunities to work with Mr. Marshall.

Respectfully submitted,

Anthony Murdock

Executive Pastor, Eastern Star Church

**March 21, 2017**

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter in support of Vanguard Collegiate of Indianapolis, a proposed, tuition-free, college-preparatory, 5-8 school for the students and families of Indianapolis' Near Northwest side.

Through rigorous curriculum and high-quality instruction, provided within an invested and ambitious school community, Vanguard Collegiate will prepare all students in grades five through eight to thrive in high school and graduate from the college of their choice. The school is designed to help all students achieve academic success and to prepare them for the rigors of college. As Youth Engagement Manager here at United Way, I support Vanguard Collegiate as an educational option for families who reside in Haughville and its surrounding areas.

Additionally, I support the leadership of proposed School Leader, Robert Marshall. I have known him for 20 years. I can attest to his commitment to founding and leading a game-changing school for students and families of Indy's Near Northwest side. His experience, training, vision for the school, passion, and experience in urban settings make him uniquely qualified to lead Vanguard Collegiate.

Over the past few months, Vanguard Collegiate's founding team has worked to connect with the community in the Haughville area and the city at large. Their work has already set the stage for even more support from the communities they will serve.

Again, I support Vanguard Collegiate as a high-quality educational option. It is my hope that the school will be granted a charter to open in August 2018. If you have any questions, please do not hesitate to contact me.

Sincerely,



Annie L. Smith  
Youth Engagement Manager  
United Way of Central Indiana

March 23, 2017

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I am writing this letter in support of Vanguard Collegiate of Indianapolis and the Lead Founder, Robert Marshall.

The proposed school leader, Mr. Marshall, is a proven leader in the nonprofit sector. His experience and passion is in youth development, specifically with at-risk young men and women. As a previous colleague of Mr. Marshall, I have seen him work with multiple organizations and programs, to make a more positive impact on the community. Mr. Marshall works to merge communities to support programs and youth, by leveraging parents, board members, community volunteers, and local corporations. Mr. Marshall is an energetic leader that works hard, and expects others around him to follow his example. He coaches his staff to produce high-impact services for youth, while keeping everyone accountable to strategic initiatives outlined by the organization. Most importantly, Mr. Marshall works with high integrity and is extremely goal-oriented. He continues to persevere to ensure that he leaves the community and youth in a better place.

The leadership qualities that Mr. Marshall possesses are a great example of the core values of Vanguard Collegiate. Mr. Marshall has instilled growth, endurance, discipline, and mastery in many youth that he has served, as well as staff members that he has worked with. This is the reason, as a community member and Director of a youth-serving organization, I support Vanguard Collegiate obtaining a charter to open in August 2018.

Sincerely,

A handwritten signature in cursive script that reads "Mackenzie Cain". The ink is dark and the handwriting is fluid and legible.

Mackenzie Cain  
Community Member

Dear Indiana Charter School Board:

My name is Rob R Love and I'm the Director of School Services of the Network for Quality Education. The Network for Quality Education provides support for services and communication to charter and non-public schools in the State of Indiana. The Network is fully committed to ensuring that all schools provide a quality education for Indiana students especially charters and non-public schools.

It is my pleasure to provide a letter of support for the approval of Vanguard Collegiate of Indianapolis Charter School, led by founder Robert Marshall. Mr. Marshall, as well as members of his dynamic founding board, are working diligently to build local partnerships to ensure doors open at Vanguard Collegiate in the Fall of 2018. Mr. Marshall brings a track record of effectiveness to this work serving as a dedicated youth services director and worker in Indy. Being from Indy and as a state licensed educator, I am inspired by Mr. Marshalls' focus on his hometown and work to ensure Vanguard Collegiate is a quality educational option focused on positive academic outcomes for our families and students.

Sincerely,

Rob R Love, J.D.

Director of Student Services

Network for Quality Education



*Trinity House Academy... where your mind is renewed, your spirit is revived and your life is changed on and for purpose.*

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March 23, 2017

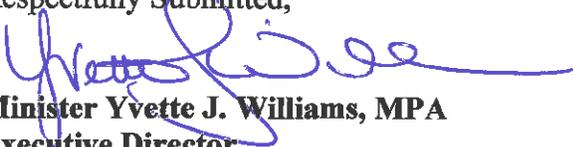
To Whom It May Concern:

My name is Yvette Williams and I am the Executive Director of Trinity House Academy which is a not for profit agency primarily serving young ladies and their families. Our mission is to be a "Christian safe haven for broken young women seeking better choices and a better life for themselves and their families". THA provides programs that stretch the young women and their families - physically, mentally and spiritually. We do this through parenting classes; a mentoring program called Guiding Hearts (GH) and our Remnant for Relationship (R&R) program, which teaches purpose and character development using biblical principles as a foundation. I am writing this support letter to you on behalf of Robert Marshall as he seeks to launch "Vanguard Collegiate" of Indianapolis, a proposed 5-8<sup>th</sup> grade tuition free public charter school.

THA has partnered with Robert in the community on other projects and he has proven to be a steadfast, competent and motivated community leader. We believe that he has succeeded in identifying other strong leaders for his Founding Board of Directors and that together they will be steadfast in portraying excellence in education as they build this school for the children of Indianapolis. We believe in their mission and anticipate they will deliver services in alignment with their core values of growth, endurance, discipline and mastery for each student.

It is again my pleasure to support the endeavors of Robert Marshall and the Founding Board of Directors as they continue launching efforts for Vanguard Collegiate of Indianapolis.

Respectfully Submitted,

  
**Minister Yvette J. Williams, MPA**  
**Executive Director**

[hornedamian@gmail.com](mailto:hornedamian@gmail.com)

317-437-0181

March 23, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Mr. Betley:

I would like to express my very strong support for Vanguard Collegiate of Indianapolis, a proposed college-preparatory public charter school for students in grades five to eight for students of Indianapolis' Near Northwest side.

I am an Indy native and have dedicated most of my career to working with youth and families. I am especially interested in supporting a college preparatory education for all students. Currently, I am the Family Learning Navigator for the Mid-North Promise Program at The Children's Museum of Indianapolis.

Vanguard Collegiate has a proven school model that is based on best practices for charter schools operating in cities around the U.S. where high expectations hold for all children regardless of the barriers they face. I know from my work with youth and families that children will rise to the occasion when high expectations are held for them in a nurturing environment. We must avoid schools that "leave children behind". Additionally, I support the Vanguard Collegiate model because it has a strong component for engaging families in their child's education. Finally, Vanguard Collegiate will achieve high academic outcomes because of its strong focus on math and literacy. These are the critical building blocks for success in school, college, and life. As an advocate for family success, I strongly support Vanguard Collegiate as a quality educational option for families who reside in Haughville and surrounding areas.

Additionally, I strongly support the leadership of proposed School Leader, Robert Marshall. I have known Robert for 16 years and I can affirm his commitment to founding and leading a college preparatory school for students and families. Over the course of his professional life, Robert has demonstrated a deep and abiding commitment to our youth. This is what motivates him and what he deeply cares about.

I also know that the Vanguard Collegiate founding team and Robert have been working to connect with residents of Haughville and the city at large to build strong community support for the school. As we know, "it takes a village" and the school founders are working hard to reach families and learn more about their goals for community and for their children.

I thank you for your consideration of Vanguard Collegiate's application and urge you to grant the school a charter. I eagerly look forward to the opening of this school in August 2018 and know that it will make a huge difference for families in Haughville. Please do not hesitate to contact me if you have any questions or desire additional information.

Sincerely,

Tremayne Horne

Family Learning Navigator for the Mid-North Promise Program, The Children's Museum of Indianapolis



United Pastors and Leaders Influencing Future Transformations  
*If not us then who?*

3/22/2017

Indiana Charter School Board  
143 West Market Street  
Suite 300  
Indianapolis, IN 46204

To Whom It May Concern:

I write this letter in support and agreement of Vanguard Collegiate of Indianapolis, a 5th-8th grade, free tuition based college-preparatory school in Indianapolis Indiana.

Education is important and the forefront of many meetings and has become a leading topic of discussion within our communities, city and state. The answer is here as Vanguard Collegiate of Indianapolis. The school is intentional about taking students from grade five to eight and putting them in the position to achieve academic success. Vanguard Collegiate is designed to teach, lead and show as well as give the students the tools to thrive and excel, graduating from their college of choice.

I furthermore support the leadership of the proposed School Leader, Robert Marshall. In the 10 years that I have known Mr. Marshall I can attest to his leadership and ability to lead this school. It is my belief that he along with the school will become part of the conversation as a model of success when topic of education is on the agenda. Mr. Robert Marshall has a wide array of skills, education, work experience and community involvement which confirms his qualification to lead. What makes him a great leader however is his passion, willingness, determination as well as commitment to see a task to completion be it labor large or small. Mr. Marshall has a great vision for Vanguard Collegiate and has my full support.

Vanguard Collegiate's leadership and founding team has intentionally worked tirelessly over the past months to connect with the community showing that they are there to foster a relationship. The work has set a foundation to do nothing but grow.

Again, I support Vanguard Collegiate of Indianapolis and its leadership as a needed educational option for city and state. It is my prayer and hope that you will grant this great model of a school to be opened in August 2018. Thank you for your time in reading this, if you should need anything further from me do not hesitate to contact me.

Thank you,

Antwan L. Houser Sr.  
UPLIFT – Founder/President

317.855.1240  
weareuplift@gmail.com  
www.weareuplift.org

Socialize with us at UPLIFT



@weareUPLIFTindy



@weareUPLIFT



@weUPLIFTindy

222 E. Ohio Street, Indianapolis, IN 46204

March 22, 2017

Adult & Child Health  
222 E. Ohio Street  
Suite 600  
Indianapolis, IN 46204

To whom it may concern,

As a community, mental health center providing vital health services to children, families and adults we look for partnerships with organizations committed to this end. We have a long history of providing quality health services in our clinics, communities and schools to best support vulnerable persons dealing with behavioral health issues.

Key to these efforts are our school based services. Adult and Child Health provides behavioral health services an estimated 125 schools throughout central Indiana. Our clinical staff are embedded in the school and work in the classrooms and with families in their homes to address behavioral health needs, thus supporting academic success for students. This model and working collaboratively with school faculty have shown improved outcomes for youth. We are looking forward to expanding those partnerships to include Vanguard Collegiate of Indianapolis. Led by Mr. Robert Marshall, we believe that Vanguard Collegiate will be equally committed to the whole health of their students and look forward to establishing a partnership to ensure students' behavioral health needs are met.

Mr. Marshall has long been a champion for the needs of youth and even serves as a member of our Board of Directors. His attention to the needs of youth in our community led our agency to seek his guidance and service on our board, and he has served us very well. We are looking forward to the opportunity to support the students in Vanguard Collegiate under his leadership in meeting both their behavioral health needs and ultimately their academic success.

Adult and Child Health is looking forward to supporting Vanguard Collegiate and Mr. Robert Marshall in his efforts to ensure academic success for students. Please contact me with any questions. We look forward to working closing with the Vanguard Collegiate team.

Sincerely,



Allen Brown, CEO  
Adult and Child Health



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 10**

# **Governance Documents**



Department of the Treasury  
Internal Revenue Service

P.O. BOX 2508  
CINCINNATI OH 45201

In reply refer to: 9999999999  
Mar. 24, 2017 LTR 3367C S0  
81-5323355 000000 00  
00020599  
BODC: TE

VANGUARD COLLEGIATE OF INDIANAPOLIS  
INC  
C/O ROBERT MARSHALL  
7160 CAMWELL DRIVE  
INDIANAPOLIS IN 46268

015989

Employer identification number: 81-5323355  
Tax form: 1023  
Document locator number: 17053-073-36400-7  
For assistance, call: 1-877-829-5500

Dear Applicant,

We received your application for exemption from federal income tax and your user fee payment.

During the initial review process, applications for exemption are separated into two groups:

1. Those that can be processed based on information submitted
2. Those that require additional information to be processed

If your application falls in the first group you'll receive a determination letter within approximately 90 days from the date of this notice stating that you re exempt from federal income tax.

If your application falls in the second group, you'll be contacted when your application has been assigned to an Exempt Organizations specialist for review. You can expect to be contacted within approximately 180 days from the date of this notice. After 180 days, if you haven't been notified your application was assigned to a specialist, you can contact Customer Account Services Monday through Friday at the toll-free number shown above to check on its status. The individual calling on your behalf will need the following information:

- \* Your name
- \* Your employer identification number (EIN)
- \* The document locator number listed above and assigned to your request
- \* A proper power of attorney submitted with your exemption application, unless the individual calling is an officer or director and legally authorized to represent you

The IRS doesn't issue "tax-exempt numbers" or "tax-exempt certificates" for state or local sales or income taxes. If you need exemption from these taxes, contact your state or local tax offices.

Most organizations are required to file an annual information return



**IRS** Department of the Treasury  
Internal Revenue Service

P.O. BOX 2508  
CINCINNATI OH 45201

015989.594258.300999.783 1 AB 0.403 536



VANGUARD COLLEGIATE OF INDIANAPOLIS  
INC  
C/O ROBERT MARSHALL  
7160 CAMWELL DRIVE  
INDIANAPOLIS IN 46268



015989

Tracking Number: **9505512670947068048893**

Updated Delivery Day: **Monday, March 13, 2017**



**Delivered**

## Product & Tracking Information

## Available Actions

**Postal Product:**  
Priority Mail™

**Features:**  
Insured

USPS Tracking®

[Text Updates](#)

[Email Updates](#)

DATE & TIME	STATUS OF ITEM	LOCATION
March 13, 2017, 10:43 am	Delivered	COVINGTON, KY 41011

Your item was delivered at 10:43 am on March 13, 2017 in COVINGTON, KY 41011.

March 11, 2017, 11:52 am	Business Closed	COVINGTON, KY 41011
March 11, 2017, 11:29 am	Arrived at Post Office	COVINGTON, KY 41011
March 11, 2017, 7:07 am	Departed USPS Facility	CINCINNATI, OH 45234
March 11, 2017, 7:02 am	Arrived at USPS Facility	COVINGTON, KY 41011
March 10, 2017, 11:38 pm	Arrived at USPS Facility	CINCINNATI, OH 45234
March 9, 2017, 9:07 pm	Arrived at USPS Origin Facility	INDIANAPOLIS, IN 46241
March 9, 2017, 1:54 pm	Acceptance	INDIANAPOLIS, IN 46254

## Track Another Package

[Tracking \(or receipt\) number](#)

## Manage Incoming Packages

[Track all your packages from a](#)



Text your tracking number to 28777 (2USPS) to get the latest status. Standard Message and Data rates may apply. You may also visit USPS.com

\*\*\*\*\*  
 BRIGHTEN SOMEONE'S MAILBOX. Greeting cards available for purchase at select post offices.  
 \*\*\*\*\*

In a hurry? Self-service kiosks offer quick and easy check-out. Any Retail Associate can show you how.

Debit Card Remit'd  
 (Card Name: Debit Card) \$858.80  
 (Account #: XXXXXXXXXXXXX0368) (Approval #: )  
 (Transaction #: 007) (Receipt #: 00512)  
 (Debit Card Purchase: \$858.80) (Cash Back: \$0.00)

Total \$858.80  
 Debit Card Remit'd \$858.80  
 Insurance (up to \$50.00 included) \$0.00  
 (9505 5126 7094 7068 0488 93)  
 (USPS Tracking #)  
 (Saturday 03/11/2017)  
 (Expected Delivery Day)  
 (Weight: 1 lb 2.90 oz)  
 (COVINGTON, KY 41012)  
 (Domestic) 1  
 PM 2-Day  
 Dom M.O. Fee \$1.60  
 (Serial #: 24554512203) \$7.20  
 Value \$850.00

Description	Sale Qty	Final Price
Product		
03/09/2017		
(800) 275-8777		
1723970011		
46254-9998		
IN		
INDIANAPOLIS		
6401 GATEWAY DR		
EAGLE CREEK		



# CUSTOMER'S RECEIPT

SEE BACK OF THIS RECEIPT FOR IMPORTANT CLAIM INFORMATION

NOT NEGOTIABLE

Pay to	Address	KEEP THIS RECEIPT FOR YOUR RECORDS

Serial Number  
**24554512203**

Year, Month, Day  
**2017-03-09** Post Office  
**46254** Amount  
**\$850.00**

Clerk  
**35**

**ARTICLES OF AMENDMENT**

**ARTICLE I - NAME AND PRINCIPAL OFFICE ADDRESS**

**BUSINESS ID** 201608311156485  
**BUSINESS TYPE** Domestic Nonprofit Corporation  
**BUSINESS NAME** VANGUARD COLLEGIATE OF INDIANAPOLIS, INC.  
**PRINCIPAL OFFICE ADDRESS** 7160 Camwell Dr., Indianapolis, IN, 46268, USA  
**DATE AMENDMENT WAS ADOPTED** 01/11/2017

**EFFECTIVE DATE**

**EFFECTIVE DATE** 01/11/2017

**ARTICLE I - PERIOD OF DURATION**

**DATE OF ADOPTION** 01/11/2017  
**EXPIRATION DATE** Perpetual

**ARTICLE I - CORPORATION TYPE AND MEMBERSHIP**

**DATE OF ADOPTION** 01/11/2017  
**TYPE OF CORPORATION** Public benefit corporation, which is organized for a public or charitable purpose  
**WILL THE CORPORATION HAVE MEMBERS?** Yes

**DISTRIBUTION OF ASSETS UPON DISSOLUTION OR FINAL LIQUIDATION**

Upon the dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

**ARTICLE I - STATEMENT OF PURPOSE**

**DATE OF ADOPTION** 01/11/2017

**STATEMENT OF PURPOSE**

Said organization is organized exclusively for charitable, religious, educational, and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501 (c) (3) of the Internal Revenue Code, or corresponding section of any future federal tax code. No part of the net earnings of the organization shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof. No substantial part of the activities of the organization shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the organization shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of this document, the organization shall not carry on any other activities not permitted to be carried on (a) by an organization exempt from federal income tax under section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or (b) by an organization, contributions to which are deductible under section 170 (c)(2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

**SIGNATURE**

THE MANNER OF THE ADOPTION OF THE ARTICLES OF BUSINESS AMENDMENT AND THE VOTE BY WHICH THEY WERE ADOPTED CONSTITUTE FULL LEGAL COMPLIANCE WITH THE PROVISIONS OF THE ACT, THE ARTICLES OF INCORPORATION, AND THE BYLAWS OF THE CORPORATION.

THE UNDERSIGNED OFFICER OF THIS NONPROFIT CORPORATION EXISTING PURSUANT TO THE PROVISIONS OF THE INDIANA NONPROFIT CORPORATION ACT DESIRES TO GIVE NOTICE OF ACTION EFFECTUATING BUSINESS AMENDMENT OF CERTAIN PROVISIONS OF ITS ARTICLES OF INCORPORATION.

IN WITNESS WHEREOF, THE UNDERSIGNED HEREBY VERIFIES, SUBJECT TO THE PENALTIES OF PERJURY, THAT THE STATEMENTS CONTAINED HEREIN ARE TRUE, THIS DAY **January 11, 2017**

**SIGNATURE** Mr. Robert Marshall  
**TITLE** President

Business ID : 201608311156485  
Filing No. : 7473662

**BUSINESS INFORMATION**  
CONNIE LAWSON  
INDIANA SECRETARY OF STATE  
12/28/2016 08:05 PM

### Business Details

Business Name: **VANGUARD COLLEGIATE OF INDIANAPOLIS, INC.** Business ID: **201608311156485**  
Entity Type: **Domestic Nonprofit Corporation** Business Status: **Active**  
Creation Date: **08/31/2016** Inactive Date:  
Principal Office Address: **7160 Camwell Dr., Indianapolis, IN, 46268, USA** Expiration Date: **Perpetual**  
Domicile State: **Indiana** Business Entity Report Due Date: **08/31/2018**  
Years Due:

### Incorporators Information

Name	Title	Address
Robert Marshall JR.	Incorporator	7160 Camwell Dr., Indianapolis, IN, 46268, USA

### Registered Agent Information

Type: **Individual**  
Name: **Robert Marshall**  
Address: **7160 Camwell Dr., Indianapolis, IN, 46268, USA**

Date of this notice: 02-13-2017

Employer Identification Number:  
81-5323355

Form: SS-4

Number of this notice: CP 575 A

VANGUARD COLLEGIATE OF INDIANAPOLIS  
7160 CAMWELL DR  
INDIANAPOLIS, IN 46268

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

**WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER**

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 81-5323355. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear off stub and return it to us.

Based on the information received from you or your representative, you must file the following form(s) by the date(s) shown.

Form 1120

04/15/2018

If you have questions about the form(s) or the due date(s) shown, you can call us at the phone number or write to us at the address shown at the top of this notice. If you need help in determining your annual accounting period (tax year), see Publication 538, *Accounting Periods and Methods*.

We assigned you a tax classification based on information obtained from you or your representative. It is not a legal determination of your tax classification, and is not binding on the IRS. If you want a legal determination of your tax classification, you may request a private letter ruling from the IRS under the guidelines in Revenue Procedure 2004-1, 2004-1 I.R.B. 1 (or superseding Revenue Procedure for the year at issue). Note: Certain tax classification elections can be requested by filing Form 8832, *Entity Classification Election*. See Form 8832 and its instructions for additional information.

**IMPORTANT INFORMATION FOR S CORPORATION ELECTION:**

If you intend to elect to file your return as a small business corporation, an election to file a Form 1120-S must be made within certain timeframes and the corporation must meet certain tests. All of this information is included in the instructions for Form 2553, *Election by a Small Business Corporation*.

If you are required to deposit for employment taxes (Forms 941, 943, 940, 944, 945, CT-1, or 1042), excise taxes (Form 720), or income taxes (Form 1120), you will receive a Welcome Package shortly, which includes instructions for making your deposits electronically through the Electronic Federal Tax Payment System (EFTPS). A Personal Identification Number (PIN) for EFTPS will also be sent to you under separate cover. Please activate the PIN once you receive it, even if you have requested the services of a tax professional or representative. For more information about EFTPS, refer to Publication 966, *Electronic Choices to Pay All Your Federal Taxes*. If you need to make a deposit immediately, you will need to make arrangements with your Financial Institution to complete a wire transfer.

The IRS is committed to helping all taxpayers comply with their tax filing obligations. If you need help completing your returns or meeting your tax obligations, Authorized e-file Providers, such as Reporting Agents (payroll service providers) are available to assist you. Visit the IRS Web site at [www.irs.gov](http://www.irs.gov) for a list of companies that offer IRS e-file for business products and services. The list provides addresses, telephone numbers, and links to their Web sites.

To obtain tax forms and publications, including those referenced in this notice, visit our Web site at [www.irs.gov](http://www.irs.gov). If you do not have access to the Internet, call 1-800-829-3676 (TTY/TDD 1-800-829-4059) or visit your local IRS office.

**IMPORTANT REMINDERS:**

- \* Keep a copy of this notice in your permanent records. **This notice is issued only one time and the IRS will not be able to generate a duplicate copy for you.** You may give a copy of this document to anyone asking for proof of your EIN.
- \* Use this EIN and your name exactly as they appear at the top of this notice on all your federal tax forms.
- \* Refer to this EIN on your tax-related correspondence and documents.

If you have questions about your EIN, you can call us at the phone number or write to us at the address shown at the top of this notice. If you write, please tear off the stub at the bottom of this notice and send it along with your letter. If you do not need to write us, do not complete and return the stub.

Your name control associated with this EIN is VANG. You will need to provide this information, along with your EIN, if you file your returns electronically.

Thank you for your cooperation.



# Form 1023 Checklist

## (Revised December 2013)

### Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code

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**Note.** Retain a copy of the completed Form 1023 in your permanent records. Refer to the General Instructions regarding Public Inspection of approved applications.

**Check each box to finish your application (Form 1023). Send this completed Checklist with your filled-in application. If you have not answered all the items below, your application may be returned to you as incomplete.**

- Assemble the application and materials in this order:
- Form 1023 Checklist
  - Form 2848, *Power of Attorney and Declaration of Representative* (if filing)
  - Form 8821, *Tax Information Authorization* (if filing)
  - Expedite request (if requesting)
  - Application (Form 1023 and Schedules A through H, as required)
  - Articles of organization
  - Amendments to articles of organization in chronological order
  - Bylaws or other rules of operation and amendments
  - Documentation of nondiscriminatory policy for schools, as required by Schedule B
  - Form 5768, *Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation* (if filing)
  - All other attachments, including explanations, financial data, and printed materials or publications. Label each page with name and EIN.
- User fee payment placed in envelope on top of checklist. DO NOT STAPLE or otherwise attach your check or money order to your application. Instead, just place it in the envelope.
- Employer Identification Number (EIN)
- Completed Parts I through XI of the application, including any requested information and any required Schedules A through H.
- You must provide specific details about your past, present, and planned activities.
  - Generalizations or failure to answer questions in the Form 1023 application will prevent us from recognizing you as tax exempt.
  - Describe your purposes and proposed activities in specific easily understood terms.
  - Financial information should correspond with proposed activities.
- Schedules. Submit only those schedules that apply to you and check either "Yes" or "No" below.
- |            |                |            |                |
|------------|----------------|------------|----------------|
| Schedule A | Yes ___ No ___ | Schedule E | Yes ___ No ___ |
| Schedule B | Yes ___ No ___ | Schedule F | Yes ___ No ___ |
| Schedule C | Yes ___ No ___ | Schedule G | Yes ___ No ___ |
| Schedule D | Yes ___ No ___ | Schedule H | Yes ___ No ___ |

- An exact copy of your complete articles of organization (creating document). Absence of the proper purpose and dissolution clauses is the number one reason for delays in the issuance of determination letters.
  - Location of Purpose Clause from Part III, line 1 (Page, Article and Paragraph Number) \_\_\_\_\_
  - Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law \_\_\_\_\_
- Signature of an officer, director, trustee, or other official who is authorized to sign the application.
  - Signature at Part XI of Form 1023.
- Your name on the application must be the same as your legal name as it appears in your articles of organization.

Send completed Form 1023, user fee payment, and all other required information, to:

Internal Revenue Service  
P.O. Box 192  
Covington, KY 41012-0192

If you are using express mail or a delivery service, send Form 1023, user fee payment, and attachments to:

Internal Revenue Service  
201 West Rivercenter Blvd.  
Attn: Extracting Stop 312  
Covington, KY 41011

**Application for Recognition of Exemption**  
**Under Section 501(c)(3) of the Internal Revenue Code**

(00)

OMB No. 1545-0056

**Note:** If exempt status is approved, this application will be open for public inspection.

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at [www.irs.gov](http://www.irs.gov) for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I - XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

**Part I Identification of Applicant**

<b>1</b> Full name of organization (exactly as it appears in your <b>organizing document</b> )		<b>2</b> c/o Name (if applicable)	
<b>3</b> <b>Mailing address</b> (Number and street) (see instructions)		Room/Suite	<b>4</b> Employer Identification Number (EIN)
City or town, state or country, and ZIP + 4		<b>5</b> Month the annual accounting period ends (01 - 12)	
<b>6</b> Primary contact (officer, director, trustee, or <b>authorized representative</b> )		<b>b</b> Phone:	
<b>a</b> Name:		<b>c</b> Fax: (optional)	
<b>7</b> Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.		<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>
<b>8</b> Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.		<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>
<b>9a</b> Organization's website:			
<b>b</b> Organization's email: (optional)			
<b>10</b> Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.		<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>
<b>11</b> Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY)		/	/
<b>12</b> Were you formed under the laws of a <b>foreign country</b> ? If "Yes," state the country.		<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>

**Part II Organizational Structure**

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. (See instructions.) **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1 Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification.  Yes  No  
See attached Exhibit A.

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- 2 Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application.  Yes  No

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- 3 Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments.  Yes  No

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- 4a Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments.  Yes  No
- b Have you been funded? If "No," explain how you are formed without anything of value placed in trust.  Yes  No

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- 5 Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected.  Yes  No

**Part III Required Provisions in Your Organizing Document**

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1 Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. Location of Purpose Clause (Page, Article, and Paragraph): \_\_\_\_\_

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- 2a Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c.
- 2b If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. \_\_\_\_\_
- 2c See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state: \_\_\_\_\_

**Part IV Narrative Description of Your Activities**

Using an attachment, describe your *past, present, and planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors**

- 1a List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

**b** List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

**c** List the names, names of businesses, and mailing addresses of your five highest compensated **independent contractors** that receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

**2a** Are any of your officers, directors, or trustees **related** to each other through **family or business relationships**? If "Yes," identify the individuals and explain the relationship.  **Yes**  **No**

**b** Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees.  **Yes**  **No**

**c** Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship.  **Yes**  **No**

**3a** For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.

**b** Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement.  **Yes**  **No**

**4** In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.

**a** Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy?  **Yes**  **No**

**b** Do you or will you approve compensation arrangements in advance of paying compensation?  **Yes**  **No**

**c** Do you or will you document in writing the date and terms of approved compensation arrangements?  **Yes**  **No**

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

- d** Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements?  Yes  No
- e** Do you or will you approve compensation arrangements based on information about compensation paid by **similarly situated** taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No
- f** Do you or will you record in writing both the information on which you relied to base your decision and its source?  Yes  No
- g** If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is **reasonable** for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.
- 
- 5a** Have you adopted a **conflict of interest policy** consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c.  Yes  No
- b** What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?
- c** What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?
- Note:** A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.
- 
- 6a** Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c through **non-fixed payments**, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No
- b** Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No
- 
- 7a** Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine that you pay no more than **fair market value**. Attach copies of any written contracts or other agreements relating to such purchases.  Yes  No
- b** Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales.  Yes  No
- 
- 8a** Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f.  Yes  No
- b** Describe any written or oral arrangements that you made or intend to make.
- c** Identify with whom you have or will have such arrangements.
- d** Explain how the terms are or will be negotiated at arm's length.
- e** Explain how you determine you pay no more than fair market value or you are paid at least fair market value.
- f** Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.
- 
- 9a** Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f.  Yes  No

## Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

- b Describe any written or oral arrangements you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at arm's length.
- e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.
- f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

## Part VI Your Members and Other Individuals and Organizations That Receive Benefits From You

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.  Yes  No
- b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations.  Yes  No
- 2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program.  Yes  No
- 3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds.  Yes  No

## Part VII Your History

The following "Yes" or "No" questions relate to your history. (See instructions.)

- 1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to non-profit status. If "Yes," complete Schedule G.  Yes  No
- 2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E.  Yes  No

## Part VIII Your Specific Activities

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain.  Yes  No
- 2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a.  Yes  No
- b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities.  Yes  No
- 3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data.  Yes  No
- b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies or any written contracts or other agreements relating to such arrangements.  Yes  No
- c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.

**Part VIII Your Specific Activities (Continued)**

**4a** Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. (See instructions.)  **Yes**  **No**

- mail solicitations
- email solicitations
- personal solicitations
- vehicle, boat, plane, or similar donations
- foundation grant solicitations
- phone solicitations
- accept donations on your website
- receive donations from another organization's website
- government grant solicitations
- Other

See attached Exhibit E.

Attach a description of each fundraising program.

**b** Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements.  **Yes**  **No**

**c** Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements.  **Yes**  **No**

**d** List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.  **Yes**  **No**  
See attached Exhibit E.

**e** Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors.  **Yes**  **No**

**5** Are you **affiliated** with a governmental unit? If "Yes," explain.  **Yes**  **No**

**6a** Do you or will you engage in **economic development**? If "Yes," describe your program.  **Yes**  **No**

**b** Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.

**7a** Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees.  **Yes**  **No**

**b** Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees.  **Yes**  **No**

**c** If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.

**8** Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate.  **Yes**  **No**

**9a** Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10.  **Yes**  **No**

**b** Do you provide child care so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**c** Of the children for whom you provide child care, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**d** Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**10** Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed.  **Yes**  **No**

**Part VIII Your Specific Activities** (Continued)

- 11** Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution.  **Yes**  **No**
- 
- 12a** Do you or will you operate in a **foreign country or countries**? If "Yes," answer lines 12b through 12d. If "No," go to line 13a.  **Yes**  **No**
- b** Name the foreign countries and regions within the countries in which you operate.
- c** Describe your operations in each country and region in which you operate.
- d** Describe how your operations in each country and region further your exempt purposes.
- 
- 13a** Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a.  **Yes**  **No**
- b** Describe how your grants, loans, or other distributions to organizations further your exempt purposes.
- c** Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract.  **Yes**  **No**
- d** Identify each recipient organization and any **relationship** between you and the recipient organization.
- e** Describe the records you keep with respect to the grants, loans, or other distributions you make.
- f** Describe your selection process, including whether you do any of the following:
- (i)** Do you require an application form? If "Yes," attach a copy of the form.  **Yes**  **No**
- (ii)** Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused.  **Yes**  **No**
- g** Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.
- 
- 14a** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15.  **Yes**  **No**
- b** Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.
- c** Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries.  **Yes**  **No**
- d** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors.  **Yes**  **No**
- e** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information.  **Yes**  **No**
- f** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately.  **Yes**  **No**

**Part VIII Your Specific Activities** (Continued)

- 15** Do you have a **close connection** with any organizations? If "Yes," explain. See attached Exhibit C.  **Yes**  **No**
- 16** Are you applying for exemption as a **cooperative hospital service organization** under section 501(e)? If "Yes," explain.  **Yes**  **No**
- 17** Are you applying for exemption as a **cooperative service organization of operating educational organizations** under section 501(f)? If "Yes," explain.  **Yes**  **No**
- 18** Are you applying for exemption as a **charitable risk pool** under section 501(n)? If "Yes," explain.  **Yes**  **No**
- 19** Do you or will you operate a **school**? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity.  **Yes**  **No**
- 20** Is your main function to provide **hospital or medical care**? If "Yes," complete Schedule C.  **Yes**  **No**
- 21** Do you or will you provide **low-income housing** or housing for the **elderly** or **handicapped**? If "Yes," complete Schedule F.  **Yes**  **No**
- 22** Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H.  **Yes**  **No**

**Note: Private foundations** may use Schedule H to request advance approval of individual grant procedures.

**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

**A. Statement of Revenues and Expenses**

	Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
		(a) From ..... To .....	(b) From ..... To .....	(c) From ..... To .....	(d) From ..... To .....	
<b>Revenues</b>	<b>1</b> Gifts, grants, and contributions received (do not include unusual grants)					
	<b>2</b> Membership fees received					
	<b>3</b> Gross investment income					
	<b>4</b> Net unrelated business income					
	<b>5</b> Taxes levied for your benefit					
	<b>6</b> Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
	<b>7</b> Any revenue not otherwise listed above or in lines 9–12 below (attach an itemized list)					
	<b>8</b> Total of lines 1 through 7					
	<b>9</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)					
	<b>10</b> Total of lines 8 and 9					
	<b>11</b> Net gain or loss on sale of capital assets (attach schedule and see instructions)					
	<b>12</b> <b>Unusual grants</b>					
	<b>13</b> Total Revenue Add lines 10 through 12					
<b>Expenses</b>	<b>14</b> Fundraising expenses					
	<b>15</b> Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
	<b>16</b> Disbursements to or for the benefit of members (attach an itemized list)					
	<b>17</b> Compensation of officers, directors, and trustees					
	<b>18</b> Other salaries and wages					
	<b>19</b> Interest expense					
	<b>20</b> Occupancy (rent, utilities, etc.)					
	<b>21</b> Depreciation and depletion					
	<b>22</b> Professional fees					
	<b>23</b> Any expense not otherwise classified, such as program services (attach itemized list)					
	<b>24</b> Total Expenses Add lines 14 through 23					

Part IX Financial Data (Continued)

B. Balance Sheet (for your most recently completed tax year)

Year End:

(Whole dollars)

Table with 18 rows for assets and liabilities, and 2 rows for fund balances. Assets include Cash, Accounts receivable, Inventories, Bonds and notes receivable, Corporate stocks, Loans receivable, Other investments, Depreciable and depletable assets, Land, and Other assets. Liabilities include Accounts payable, Contributions, gifts, grants, etc. payable, Mortgages and notes payable, and Other liabilities. Fund Balances or Net Assets include Total fund balances or net assets and Total Liabilities and Fund Balances or Net Assets.

Part X Public Charity Status

Part X is designed to classify you as an organization that is either a private foundation or a public charity. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a private operating foundation. (See instructions.)

- 1a Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed.
b As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3).
2 Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities...
3 Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI.
4 Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation?
5 If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box.
The organization is not a private foundation because it is:
a 509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A.
b 509(a)(1) and 170(b)(1)(A)(ii)—a school. Complete and attach Schedule B.
c 509(a)(1) and 170(b)(1)(A)(iii)—a hospital, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C.
d 509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, g, or h or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D.

**Part X Public Charity Status (Continued)**

- e 509(a)(4)—an organization organized and operated exclusively for testing for public safety.
- f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross **investment income** and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status.

**6** If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

- a Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period*, provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at [www.irs.gov](http://www.irs.gov) or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling.

**Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code**

For Organization

.....  
 (Signature of Officer, Director, Trustee, or other authorized official)

.....  
 (Type or print name of signer)

.....  
 (Date)

.....  
 (Type or print title or authority of signer)

For IRS Use Only

.....  
 IRS Director, Exempt Organizations

.....  
 (Date)

- b Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii).

(i) **(a)** Enter 2% of line 8, column (e) on Part IX-A. Statement of Revenues and Expenses. \_\_\_\_\_

**(b)** Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box.

(ii) **(a)** For each year amounts are included on lines 1, 2, and 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person**. If the answer is "None," check this box.

**(b)** For each year amounts are included on line 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A. Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," check this box.

**7** Did you receive any unusual grants during any of the years shown on Part IX-A. Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual.  **Yes**  **No**

**Part XI User Fee Information**

You must include a user fee payment with this application. It will not be processed without your paid user fee. If your average annual gross receipts have exceeded or will exceed \$10,000 annually over a 4-year period, you must submit payment of \$850. If your gross receipts have not exceeded or will not exceed \$10,000 annually over a 4-year period, the required user fee payment is \$400. See instructions for Part XI, for a definition of **gross receipts** over a 4-year period. Your check or money order must be made payable to the United States Treasury. *User fees are subject to change. Check our website at [www.irs.gov](http://www.irs.gov) and type "User Fee" in the keyword box, or call Customer Account Services at 1-877-829-5500 for current information.*

- 1 Have your annual gross receipts averaged or are they expected to average not more than \$10,000?  **Yes**  **No**  
 If "Yes," check the box on line 2 and enclose a user fee payment of \$400 (Subject to change—see above).  
 If "No," check the box on line 3 and enclose a user fee payment of \$850 (Subject to change—see above).
- 2 Check the box if you have enclosed the reduced user fee payment of \$400 (Subject to change).
- 3 Check the box if you have enclosed the user fee payment of \$850 (Subject to change).

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

**Please Sign Here**



.....  
(Signature of Officer, Director, Trustee, or other authorized official)

.....  
(Type or print name of signer)

.....  
(Date)

.....  
(Type or print title or authority of signer)

**Reminder:** Send the completed Form 1023 Checklist with your filled-in-application.

**Schedule B. Schools, Colleges, and Universities**

If you operate a school as an activity, complete Schedule B

**Section I Operational Information**

**1a** Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on? If "No," do not complete the remainder of Schedule B.  **Yes**  **No**

**b** Is the primary function of your school the presentation of formal instruction? If "Yes," describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If "No," do not complete the remainder of Schedule B.  **Yes**  **No**

**2a** Are you a public school because you are operated by a state or subdivision of a state? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B.  **Yes**  **No**

**b** Are you a public school because you are operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B.  **Yes**  **No**

**3** In what public school district, county, and state are you located?

**4** Were you formed or substantially expanded at the time of public school desegregation in the above school district or county?  **Yes**  **No**

**5** Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain.  **Yes**  **No**

**6** Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain.  **Yes**  **No**

**7** Do you or will you contract with another organization to develop, build, market, or finance your facilities? If "Yes," explain how that entity is selected, explain how the terms of any contracts or other agreements were or will be negotiated at arm's length, and explain how you determine that you will pay no more than fair market value for services.  **Yes**  **No**

**Note.** Make sure your answer is consistent with the information provided in Part VIII, line 7a.

**8** Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services.  **Yes**  **No**

**Note.** Answer "Yes" if you manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.

**Section II Establishment of Racially Nondiscriminatory Policy**

Information required by **Revenue Procedure 75-50.**

**1** Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body? If "Yes," state where the policy can be found or supply a copy of the policy. If "No," you must adopt a nondiscriminatory policy as to students before submitting this application. See Publication 557.  **Yes**  **No**

**2** Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy?  **Yes**  **No**

**a** If "Yes," attach a representative sample of each document.

**b** If "No," by checking the box to the right you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement.

**3** Have you published a notice of your nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community? (See the instructions for specific requirements.) If "No," explain.  **Yes**  **No**

**4** Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to admissions; use of facilities or exercise of student privileges; faculty or administrative staff; or scholarship or loan programs? If "Yes," for any of the above, explain fully.  **Yes**  **No**

**Schedule B. Schools, Colleges, and Universities (Continued)**

**5** Complete the table below to show the racial composition for the current academic year and projected for the next academic year, of: (a) the student body, (b) the faculty, and (c) the administrative staff. Provide actual numbers rather than percentages for each racial category.

If you are not operational, submit an estimate based on the best information available (such as the racial composition of the community served).  
See Exhibit C.

Racial Category	(a) Student Body		(b) Faculty		(c) Administrative Staff	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
<b>Total</b>						

**6** In the table below, provide the number and amount of loans and scholarships awarded to students enrolled by racial categories.

Racial Category	Number of Loans		Amount of Loans		Number of Scholarships		Amount of Scholarships	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
<b>Total</b>								

**7a** Attach a list of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.

**b** Do any of these individuals or organizations have an objective to maintain segregated public or private school education? If "Yes," explain.  **Yes**     **No**

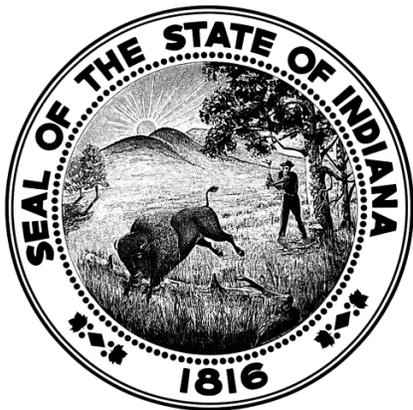
**8** Will you maintain records according to the non-discrimination provisions contained in Revenue Procedure 75-50? If "No," explain. (See instructions.)  **Yes**     **No**

State of Indiana  
Office of the Secretary of State

Certificate of Amendment  
of  
**VANGUARD COLLEGIATE OF INDIANAPOLIS, INC.**

I, CONNIE LAWSON, Secretary of State, hereby certify that Articles of Amendment of the above Domestic Nonprofit Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

NOW, THEREFORE, with this document I certify that said transaction will become effective  
Wednesday, January 11, 2017.



In Witness Whereof, I have caused to be affixed my  
signature and the seal of the State of Indiana, at the City  
of Indianapolis, January 11, 2017

*Connie Lawson*

CONNIE LAWSON  
SECRETARY OF STATE

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To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>

**VANGUARD COLLEGIATE OF INDIANAPOLIS CHARTER SCHOOL**  
**BOARD OF DIRECTORS**  
**BYLAWS - DRAFT**

1. General

- 1.1. Name. The name of the corporation is Vanguard Collegiate of Indianapolis. (the "Corporation").
- 1.2. Initial Registered Office and Initial Registered Agent. The post office address of the Corporation's initial registered office is 7160 Camwell Dr. Indianapolis, IN 46268. The initial registered agent is Robert Marshall. Vanguard Collegiate of Indianapolis ("Vanguard Collegiate") may also have offices at such other places as the Board of Directors (Board) shall determine the business of Vanguard Collegiate requires; provided, however, that the registered office be registered with the Secretary of State of Indiana and the agent so registered be located at the same address, or otherwise provided by the Board of Directors.
- 1.3. The purposes for which Vanguard Collegiate is organized is to provide a 5-8 middle school education for the children of Indianapolis.
- 1.4. Fiscal Year. The fiscal year of the Corporation shall begin on the first day of July and end on the last day of June in the succeeding year.
- 1.5. Tax Status. Notwithstanding any other provision of these Bylaws, the corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or (2) by a corporation, contributions to which are deductible under 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.
- 1.6. Dissolution. In the event of dissolution: (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the common school fund; and (2) remaining funds received from the department shall be returned to the department not more than thirty (30) days after dissolution. If the assets of the charter school are insufficient to pay all parties to whom the charter school owes compensation under subdivision (1), the priority of the distribution of assets may be determined by a court.

2. Board of Directors

2.1. Directors.

- 2.1.1. The affairs of the Corporation shall be managed, controlled, and conducted by, and under the supervision of, the Board of Directors, subject to the provisions of the

Articles of Incorporation (the “Articles”) and these Bylaws. The Board of Directors shall consist of at least seven (7) and not more than fifteen (15) members. All members of the Board of Directors shall be residents of the State of Indiana, and at least sixty percent (60%) of the members of the Board of Directors shall be residents of the Indiana counties where current students at the charter school reside.

- 2.1.2. At a regular meeting of the Board of Directors immediately preceding the expiration of the term of any director, or at a special meeting, the Board of Directors shall elect a new director whose term will expire, or has expired, and each such new director shall serve for a term of three (3) years, or such other period as prescribed by the directors at the time of such election, and until his or her successor is elected and qualified. A director may serve no more than two (2) consecutive terms. Directors shall serve staggered terms to balance continuity with new perspective.
- 2.1.3. Following the expiration of a director’s final term, at least one (1) year must elapse before he or she may again be elected to the Board of Directors.
- 2.1.4. The initial Board of Directors will serve staggered terms. The initial Board shall consist of at least two directors who will serve a one-year term (ending in Spring 2018), at least two directors who will serve a two-year term (ending in spring 2019), and at least two directors who will serve a three-year term (ending in Spring 2020).

### 3. Meetings

- 3.1. Regular Meetings. The Board of Directors shall hold regular meetings, as fixed by these Bylaws or by resolution of the Board of Directors.
- 3.2. Annual Meeting. The annual meeting of the Board of Directors shall occur in the last quarter of the fiscal year. There shall be at least ten (10) other regular meetings of the Board held each year. Notice shall be given to each Director thirty (30) days prior to the date of every regular meeting of the Board.
- 3.3. Special Meetings. Notwithstanding the preceding Section 3.1, the Board of Directors may hold special meetings for any lawful purpose upon not less than forty-eight (48) hours’ notice (excluding Saturdays, Sundays, and legal holidays), as described in Section 3.7. Special meetings may be called by the Chair of the Board or by two (2) or more members of the Board of Directors. A special meeting shall be held within the State of Indiana and the notice of the meeting shall specify the date, time, and place.
- 3.4. Quorum and Approval of Actions. A majority of the directors in office immediately before a meeting begins shall constitute a quorum for the transaction of any business properly to come before the Board of Directors. Unless otherwise provided in the Articles or these Bylaws, the approval of a quorum shall be deemed an act of the Board of Directors.

- 3.5. Emergency Meetings. In the event of an emergency, including but not limited to (1) an act of God; or (2) serious danger or threat to students and/or staff, a special meeting may be called with little or no notice. Any actions taken by the Board will be treated as if taken at a regularly noticed meeting. A quorum must be present to initiate a vote.
- 3.6. Compliance with Indiana Open Door Law. Notwithstanding any other provisions of these Bylaws, the Corporation shall comply in all respects with the Indiana Open Door Law (currently codified at Indiana Code (“IC”) section 5-14-1.5, et seq.), and any corresponding provision of subsequent Indiana law, in connection with all regular or special meetings of the Board of Directors.
- 3.7. Notice of Special Meetings. Written notice of the date, time, and place of each special meeting of the Board of Directors shall be communicated, delivered, or mailed by the Secretary of the Board, or by the person or persons calling the meeting, to each member of the Board of Directors so that such notice is effective at least forty-eight (48) hours before the date of the meeting and complies with the Indiana Open Door Law. The notice need not describe the purpose of the special meeting. Written, electronic, or telefaxed notice, where applicable, shall be effective at the earliest of the following:
- 3.7.1. When received;
  - 3.7.2. Five (5) days after notice is mailed, as evidenced by the postmark or private carrier receipt, if mailed correctly addressed to the address listed in the most current of records of the Corporation; or
  - 3.7.3. On the date shown on the return receipt, if sent by registered or certified United States mail, return receipt requested, and the receipt is signed by, or on behalf of, the addressee.
- 3.8. Waiver of Notice. Notice of a meeting may be waived in writing if signed by the director entitled to notice and filed with the minutes or the corporate records. Attendance at or participation in any meeting of the Board of Directors shall constitute a waiver of lack of notice or defective notice of such meeting unless the director, at the beginning of the meeting or promptly upon the director’s arrival, objects to holding the meeting and does not vote for or assent to any action taken at the meeting.
- 3.9. Action by Written Consent. Any action required or permitted to be taken at any meeting of the Board of Directors, or any committee thereof, may be taken without a meeting if written consent describing such action is signed by each director or committee member and if such written consent is included in the minutes or filed with the Corporation’s records reflecting the action taken. Action taken by written consent shall be effective when the last director or committee member signs the consent and the Board of Directors ratifies the action taken in a subsequent meeting held pursuant to the Indiana Open Door Law, unless the consent

specifies a prior or subsequent effective date. A consent signed as described herein shall have the same effect as if approved at a meeting and may be described as such in any document.

3.10. Resignation, Removal, and Vacancies.

3.10.1. Any director may resign at any given time by giving written notice of such resignation to the Board of Directors, the President, or the Secretary. Such resignation shall take effect at the time specified therein, or if no time is specified, at the time of its receipt. The acceptance of a resignation shall not be necessary to make it effective.

3.10.2. Any director may be removed for a cause by a majority of the directors then in office. Cause shall include, but shall not be limited to:

3.10.2.1. Violations of applicable law, including (but not limited to):

3.10.2.1.1. Violations of the Indiana Charter School Law;

3.10.2.1.2. Violations of Indiana or federal laws; or

3.10.2.1.3. Any actions that would jeopardize the tax-exempt status of the Corporation or would subject it to sanctions under the Internal Revenue Service Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws (the "Code").

3.10.2.2. Breach of fiduciary duty, including (but not limited to) a violation of the applicable standard of care under the Articles, these Bylaws, or applicable law.

3.10.2.3. Breach of any governing document relating to the Corporation, including (but not limited to) the Articles, these Bylaws, and the Charter Agreement.

3.10.2.4. Inadequate attendance at meetings of the Board of Directors, defined as absence from three (3) consecutive meetings or from at least fifty (50%) of such meetings within one (1) calendar year.

3.10.3. Any vacancy occurring in the Board of Directors and any position to be filled by reason of an increase in the number of directors may be filled, upon recommendation of a qualified candidate by the Governance Committee, by two-thirds (2/3) vote of the seated Directors. A director elected to fill the vacancy shall be elected for the unexpired term of his/her predecessor in office.

3.11. Members of the Board of Directors.

- (A) Shall receive no payment of honoraria, excepting reimbursement for expenses incurred in performance of voluntary Vanguard Collegiate activities in accordance with Vanguard Collegiate of Indianapolis Charter School Policies. Written proof of any reimbursement shall be submitted to the Treasurer by the Member seeking reimbursement.
  - (B) All participants in Board work are bound by the Code of Conduct and Conflict of Interest Laws enumerated in the Indiana Code § 25.
  - (C) Shall have no direct or indirect financial interest in the assets or leases of the Vanguard Collegiate of Indianapolis Charter School; any Director who individually or as part of a business or professional firm is involved in the business transactions or current professional services of the Vanguard Collegiate of Indianapolis Charter School shall disclose this relationship and shall not participate in any vote taken with respect to such transactions or services.
- 3.12 Indiana Code: §23-1-35-1 “Enumeration of Conduct Standards Which Avert Personal Liability” is hereby fully incorporated in this agreement, and shall provide the standards relating to conduct and actions by the Board of Directors, specifically as follows:
- (a) A director shall, based on facts then known to the director, discharge the duties as a director, including the director’s duties as a member of a committee:
    - (1) in good faith;
    - (2) with the care an ordinarily prudent person in a like position would exercise under similar circumstances; and
    - (3) in a manner the director reasonably believes to be in the best interests of the corporation.
  - (b) In discharging the director’s duties a director is entitled to rely on information, opinions, reports, or statements, including financial statements and other financial data, if prepared or presented by:
    - (1) one (1) or more officers or employees of the corporation whom the director reasonably believes to be reliable and competent in the matters presented;
    - (2) legal counsel, public accountants, or other persons as to matters the director reasonably believes are within the person’s professional or expert competence; or
    - (3) a committee of the board of directors of which the director is not a member if the director reasonably believes the committee merits confidence.
  - (c) A director is not acting in good faith if the director has knowledge concerning the matter in question that makes reliance otherwise permitted by subsection (b) unwarranted.
  - (d) A director may, in considering the best interests of a corporation, consider the effects of any action on shareholders, employees, suppliers, and customers of the corporation, and communities in which offices or other facilities of the corporation are located, and any other factors the director considers pertinent.
  - (e) A director is not liable for any action taken as a director, or any failure to take any action, regardless of the nature of the alleged breach of duty, including alleged breaches of the duty of care, the duty of loyalty, and the duty of good faith, unless:

- (1) the director has breached or failed to perform the duties of the director's office in compliance with this section; and
- (2) the breach or failure to perform constitutes willful misconduct or recklessness.

(f) In enacting this article, the general assembly established corporate governance rules for Indiana corporations, including in this chapter, the standards of conduct applicable to directors of Indiana corporations, and the corporate constituent groups and interests that a director may take into account in exercising the director's business judgment. The general assembly intends to reaffirm certain of these corporate governance rules to ensure that the directors of Indiana corporations, in exercising their business judgment, are not required to approve a proposed corporate action if the directors in good faith determine, after considering and weighing as they deem appropriate the effects of such action on the corporation's constituents, that such action is not in the best interests of the corporation. In making such determination, directors are not required to consider the effects of a proposed corporate action on any particular corporate constituent group or interest as a dominant or controlling factor. Without limiting the generality of the foregoing, directors are not required to render inapplicable any of the provisions of IC 23-1-43, to redeem any rights under or to render inapplicable a shareholder rights plan adopted pursuant to [IC 23-1-26-5](#), or to take or decline to take any other action under this article, solely because of the effect such action might have on a proposed acquisition of control of the corporation or the amounts that might be paid to shareholders under such an acquisition. Certain judicial decisions in Delaware and other jurisdictions, which might otherwise be looked to for guidance in interpreting Indiana corporate law, including decisions relating to potential change of control transactions that impose a different or higher degree of scrutiny on actions taken by directors in response to a proposed acquisition of control of the corporation, are inconsistent with the proper application of the business judgment rule under this article. Therefore, the general assembly intends:

- (1) to reaffirm that this section allows directors the full discretion to weigh the factors enumerated in subsection (d) as they deem appropriate; and
- (2) to protect both directors and the validity of corporate action taken by them in the good faith exercise of their business judgment after reasonable investigation.

(g) In taking or declining to take any action, or in making or declining to make any recommendation to the shareholders of the corporation with respect to any matter, a board of directors may, in its discretion, consider both the short term and long term best interests of the corporation, taking into account, and weighing as the directors deem appropriate, the effects thereof on the corporation's shareholders and the other corporate constituent groups and interests listed or described in subsection (d), as well as any other factors deemed pertinent by the directors under subsection (d). If a determination is made with respect to the foregoing with the approval of a majority of the disinterested directors of the board of directors, that determination shall conclusively be presumed to be valid unless it can be demonstrated that the determination was not made in good faith after reasonable investigation.

(h) For the purposes of subsection (g), a director is disinterested if:

- (1) the director does not have a conflict of interest, within the meaning of section 2 [[IC 23-1-35-2](#)] of this chapter, in connection with the action or recommendation in question;

- (2) in connection with matters described in IC 23-1-32 the director is disinterested (as defined in [IC 23-1-32-4\(d\)](#));
- (3) in connection with any matter involving or otherwise affecting:
- (A) a control share acquisition (as defined in [IC 23-1-42-2](#)) or any matter related to a control share acquisition under IC 23-1-42 or other provisions of this article;
  - (B) a business combination (as defined in [IC 23-1-43-5](#)) or any matter related to a business combination under IC 23-1-43 (including a person becoming an interested shareholder) or other provisions of this article; or
  - (C) any transaction that may result in a change of control (as defined in [IC 23-1-22-4](#)) of the corporation;
- the director is not an employee of the corporation; and
- (4) in connection with any matter involving or otherwise affecting:
- (A) a control share acquisition (as defined in [IC 23-1-42-2](#)) or any matter related to a control share acquisition under IC 23-1-42 or other provisions of this article;
  - (B) a business combination (as defined in [IC 23-1-43-5](#)) or any matter related to a business combination under IC 23-1-43 (including a person becoming an interested shareholder) or other provisions of this article; or
  - (C) any transaction that may result in a change of control (as defined in [IC 23-1-22-4](#)) of the corporation;
- the director is not an affiliate or associate of, or was not nominated or designated as a director by, a person proposing any of the transactions described in clause (A), (B), or (C).
- (i) A person may be disinterested under this section even though the person is a director or shareholder of the corporation.”

#### 4. Officers

##### 4.1. In General.

- 4.1.1. There shall be four (4) elective Officers of the Board: a Chair, a Vice Chair, a Secretary, and a Treasurer.
- 4.1.2. The Governance Committee shall present a slate of officers to the Board of Directors. The nominated Officers shall be drawn from among the members of the Board of Directors. The election of Officers shall be held at the annual meeting of the Board.
- 4.1.3. The newly elected Officers shall take office on July 1 following the close of the meeting at which they are elected and the term of office shall be one year, or until respective successors assume office. A director may serve more than one (1) term in the same office, but not more than three consecutive terms in the same office.

- 4.2. Chair. The Chair shall preside at all meetings of the Board of Directors and shall be responsible for implementing policies established by the Board of Directors. The Chair shall perform such other duties as the Board of Directors may prescribe.
- 4.3. Vice Chair. The Vice Chair shall assist the Chair and shall preside in place of the President at meetings when the Chair is absent. The Vice Chair shall assume the duties of the Chair when the Chair's office is vacant. The Vice Chair shall perform other duties as the Board of Directors or the Chair may prescribe.
- 4.4. Secretary. The Secretary shall be the custodian of all papers, books, and records of the Corporation other than books of account and financial records. The Secretary shall prepare and maintain a record of the minutes of all meetings of the Board of Directors. The Secretary shall send meeting notices and any other correspondence on behalf of the Corporation, where applicable. The Secretary shall authenticate records of the Corporation as necessary. The Secretary shall perform the duties usual to such position and such other duties as the Board of Directors or the President may prescribe.
- 4.5. Treasurer. The Treasurer shall prepare and maintain correct and complete records of account of the Corporation. All notes, securities, and other assets coming into the possession of the Corporation shall be received, accounted for, and placed in safekeeping as the Treasurer may from time to time prescribe. The Treasurer shall maintain any checks distributed to the Corporation and shall be responsible for drafting checks, where applicable, and until such time that the Corporation appoints another individual to oversee these duties. The Treasurer shall collect any revenue for the Corporation, where applicable, and deposit such revenue in the Corporation's designated financial account(s), until such time that the Corporation appoints another individual to oversee these duties. The Treasurer shall finish, whenever requested by the Board of Directors or the Chair, a statement of the financial condition of the Corporation and shall perform the duties usual to such position and such other duties as the Board of Directors or the Chair may prescribe.
- 4.6. Other Officers. In the event that the office of the Chair becomes vacant, the vice-Chair shall become Chair for the unexpired portion of the term. In the event that the office of the Vice-Chair or Secretary-Treasurer becomes vacant, the Chair will appoint interim Officers to fill such vacant offices until a scheduled meeting of the Board can be held.

## 5. Committees

### 5.1. In General.

- 5.1.1. A Board resolution shall appoint committees or task forces of the Board, except the Governance Committee. Committees may be composed of Directors or community members, or both. The Board may prescribe the need and/or the composition of such committees.

5.1.2. There shall be a standing nominating committee, known as the Governance Committee. This committee shall be composed of at least three (3) persons recommended by the Chair and elected by the Board of Directors at its annual meeting. Each committee member shall serve a term of two (2) years, and these terms shall be staggered to ensure continuity of committee membership. The committee shall elect its own chair.

5.1.3. The duties of the Governance Committee shall be:

- (A) to study the qualifications of candidates and present a slate of the best qualified as nominees for the vacant Director positions to the Board;
- (B) to present a slate of nominees for Officers to the Board for election at the annual meeting;
- (C) to recommend candidates to the Board to fill vacancies that arise outside the regular nominating process;
- (D) to provide ongoing orientation to Directors;
- (E) to oversee a Director assessment process to ensure optimum performance; and
- (F) to recommend the appointment of a past Chair to the Board, if necessary, in the interests of the community.

## 6. Indemnification

6.1. Indemnification by the Corporation. Vanguard Collegiate shall to the fullest extent now or hereinafter permitted by law, indemnify against judgments, fines, amounts paid in settlement and reasonable expenses, including attorney's fees, any person made, or threatened to be made, a party to any action or proceeding by reason of the fact that he or she, his or her testator or interstate was a Director, Officer, employee or agent of Vanguard Collegiate.

## 7. Contracts, Checks, Loans, Deposits, and Gifts

7.1. Contracts. The Board of Directors may authorize one or more officers, agents, or employees of the Corporation to enter into any contract or execute any instrument on its behalf. Such authorization may be general or confined to specific instances. Unless so authorized by the Board of Directors, no officer, agent, or employee shall have any power to bind the Corporation or to render it liable for any purpose or amount.

- 7.2. Checks. All checks, drafts, or other orders for payment of money by the Corporation shall be signed by such person or persons as the Board of Directors may from time to time designate by resolution. Such designation may be general or confined to specific instances.
- 7.3. Loans. Unless authorized by the Board of Directors, no loan shall be made by or contracted for on behalf of the Corporation and no evidence of indebtedness shall be issued in its name. Such authorization may be general or confined to specific instances.
- 7.4. Deposits. All funds of the Corporation shall be deposited to its credit in such bank(s) or depositories as the Board of Directors may designate. Such designation may be general or confined to specific instances.
- 7.5. Gifts. The Board of Directors may accept on behalf of the Corporation any gift, grant, bequest, devise, or other contribution for the purposes of the Corporation on such terms and conditions as the Board of Directors shall determine.
8. Rules of Order. In case of conflict or challenge, the rules of order in the current edition of Robert's Rules of Order shall govern the conduct of all meetings of Vanguard Collegiate.
9. Amendments. These Bylaws may be amended at a regular meeting by a two-thirds vote of all Directors then in office; provided that notice of the proposed amendment, together with a copy hereof, is mailed to each Board member at least fifteen (15) days prior to the meeting at which the amendment is to be considered.

**VANGUARD COLLEGIATE OF INDIANAPOLIS CHARTER SCHOOL**  
**BOARD OF DIRECTORS**  
**CODE OF ETHICS**

In addition to its Bylaws, Vanguard Collegiate of Indianapolis Charter School (“Vanguard Collegiate”) will have the following policies related to ethics for the Board of Directors: Conflict of Interest Policy, Confidentiality, and Nepotism.

**8.01 Conflict of Interest Policy**

1. Board members shall serve without compensation, but may be reimbursed, with prior approval, for any necessary expenses incurred by them in performing their duties as members of the Board.
2. Any contract with the school involving a member of the Board, the Board member’s family, or the Board member’s place of work shall be considered by the full Board with the interested member abstaining. Each Board member is responsible to make known to the Board any circumstances that could involve a potential conflict of interest.
3. Salary and other remuneration received from the school by ex-officio Board members shall not be considered a conflict of interest for the purposes of this policy. However, *ex-officio* members shall abstain from votes involving the level of such remuneration.
4. A full Conflict of Interest Policy containing Board Member signatures shall be on file at all times.

**8.02 Confidentiality Policy**

It is the policy of Vanguard Collegiate that directors and employees may not disclose, divulge, or make accessible confidential information belonging to, or obtained through their affiliation with Vanguard Collegiate to any person, including relatives, friends and business and professional associates, other than to persons who have a legitimate need for such information and to whom Vanguard Collegiate has authorized disclosure. Directors and employees shall use confidential information solely for the purpose of performing services as a trustee or employee for Vanguard Collegiate. This policy is not intended to prevent disclosure where disclosure is required by law.

Directors and employees must exercise good judgment and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places, such as restaurants, elevators, and airplanes, should be limited to matters that do not pertain to information of a sensitive or confidential nature. In addition, trustees and employees should be sensitive to the risk of inadvertent disclosure and should for example, refrain from leaving confidential information on desks or otherwise in plain view and refrain from the use of speaker phones to discuss confidential information if the conversation could be heard by unauthorized persons.

At the end of a Director’s term in office or upon termination of an employee’s employment, he or she shall return, at the request of Vanguard Collegiate, all documents, papers, and other materials, regardless of medium, which may contain or be derived from confidential information, in his or her possession.

### **8.03 Nepotism Policy**

For purposes of this nepotism policy, the term *family members* shall be defined as any of the following: husband, wife, son, son-in-law, daughter, daughter-in-law, father, father-in-law, mother, mother-in-law, brother, brother-in-law, sister, sister-in-law, grandparents, and grandchildren.

1. At no time shall more than one family member of the same family serve concurrently on the Board.
2. Board members and their family members will be excluded from consideration for employment by the organization.
3. Employees shall not hold a position with the organization while they or members of their family serve on the Board or any committee of the Board.
4. Employees may not hold a job over which a member of their family exercises supervisory authority.

**Director and Officer Annual Conflict of Interest Statement Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate)**

**VANGUARD COLLEGIATE OF INDIANAPOLIS CHARTER SCHOOL  
BOARD OF DIRECTORS  
CONFLICT OF INTEREST**

**Article I**  
**Purpose**

The purpose of the conflict of interest policy is to protect The Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of Vanguard Collegiate or might result in a possible excess benefit transaction and; to provide guidance on how to approve or disapprove a transaction that may be in the best interest of the organization. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

**Article II**  
**Definitions**

**1. Interested Person**

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

**2. Financial Interest**

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment in any entity with which Vanguard Collegiate has a transaction or arrangement,
- b. A compensation arrangement with Vanguard Collegiate or with any entity or individual with which Vanguard Collegiate has a transaction or arrangement, or
- c. A potential ownership or investment in, or compensation agreement with, any entity or individual with which Vanguard Collegiate is negotiating a transaction or arrangement.

Compensation includes direct or indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

**Article III**  
**Procedures**

**1. Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

**Director and Officer Annual Conflict of Interest Statement Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate)**

**Article V**  
**Compensation**

The Directors and Officers of the Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate) shall serve without compensation.

**Article VI**  
**Annual Statements**

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflict of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands Vanguard Collegiate is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

**Article VII**  
**Periodic Reviews**

To ensure Vanguard Collegiate operates in a manner consistent with charitable purpose and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the results of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to Vanguard Collegiate's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in excess benefit transaction.

**Article VIII**  
**Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, Vanguard Collegiate may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

**Director and Officer Annual Conflict of Interest Statement Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate)**

**2. Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

**3. Procedures for Addressing the Conflict of Interest**

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The interested person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
- c. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- d. After exercising due diligence, the governing board or committee shall determine whether Vanguard Collegiate can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- e. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in Vanguard Collegiate's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

**4. Violations of the Conflicts of Interest Policy**

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

**Article IV**  
**Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

**Director and Officer Annual Conflict of Interest Statement Vanguard Collegiate of Indianapolis Charter School (Vanguard Collegiate)**

1. Name: \_\_\_\_\_ Date: \_\_\_\_\_

2. Position: \_\_\_\_\_

3. Are you a voting Director? Yes or No  
Are you an Officer? Yes or No  
If you are an Officer, which Officer position do you hold? \_\_\_\_\_

4. I affirm the following:

I have received a copy of the Vanguard Collegiate Conflict of Interest Policy. \_\_\_\_\_  
(initial)

I have read and understand the policy. \_\_\_\_\_ (initial)

I agree to comply with the policy. \_\_\_\_\_ (initial)

I understand that Vanguard Collegiate is charitable and in order to maintain its federal tax exemption it must engage primarily in activities with accomplish one or more of tax-exempt purposes. \_\_\_\_\_ (initial)

5. Disclosures:

a. Do you have a financial interest (current or potential), including a compensation arrangement, as defined in the Conflict of Interest policy with Vanguard Collegiate? Yes or No

If yes, please describe it: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy?  
Yes or No

b. In the past, have you had a financial interest, including compensation arrangement, as defined in the Conflict of Interest policy with Vanguard Collegiate? Yes or No

If yes, please describe it, including when (approximately): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy?  
Yes or No

Signature of Director: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Review by Governance Committee: \_\_\_\_\_



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 11**

## **Statement of Assurances**

Exhibit E

Statement of Assurances

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

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

successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

11. Recipients understand that the ICSB may revoke the charter if the ICSB deems that the recipient is not fulfilling the academic goals, fiscal management, or legal and operational responsibilities outlined in the charter.

**Signature from Authorized Representative of the Charter School Applicant**

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

**Name and Title**

Robert Marshall, Executive Director

**Signature**



**DATE**

8-28-17



VANGUARD COLLEGIATE  
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# **Attachment 12**

# **Organizational Chart**

**Attachment 12: Provide the school’s Staffing Structure, which includes:**

- a. An organizational chart for the proposed school at Year 1
  - b. An organizational chart for the proposed school at Full Capacity
  - c. Identified all administrative, operational, instructional and non-instructional personnel, as well as any paraprofessionals or specialty teachers.
  - d. Clearly delineate the roles and responsibilities of the governing board and staff.
- 

At Vanguard Collegiate, our organizational chart serves our mission and goals, and is aligned with the needs of our enrollment over time within a slow growth model. All roles and reporting relationships ensure that we are providing high-quality, rigorous instruction, as well as establishing from day one a school grounded in a culture of respect, structure, high academic and behavior expectations, discipline, and support that will set all students on a path for high school, college, and life success.

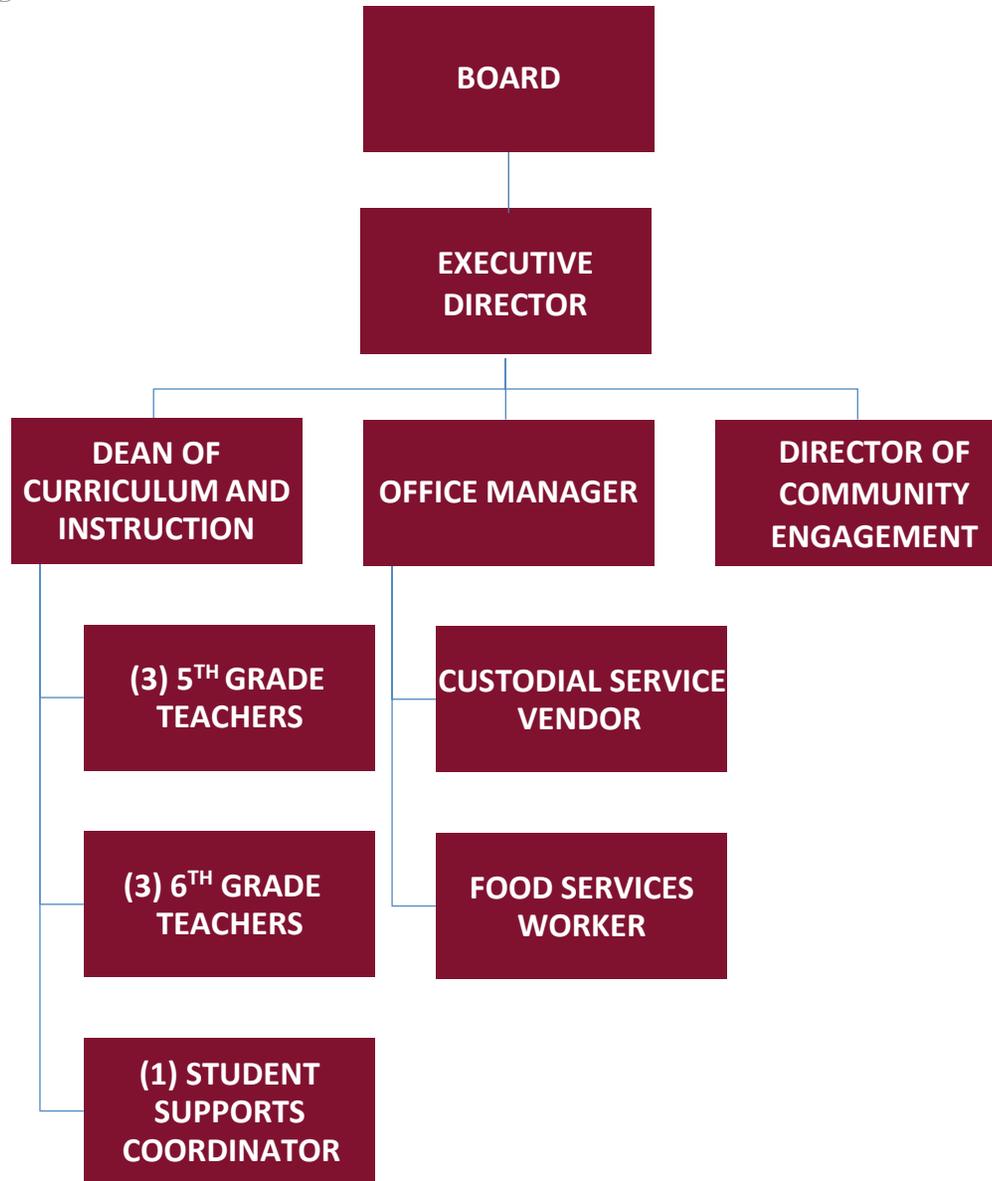
**Year 1 Staffing.** In the first year of school operation, oversight and governance will be led by the Board of Directors. Implementation of the school’s mission/vision, operational systems, and the discipline policy, and oversight of the staff will be led by the Executive Director, who will be supported by a lean administrative team. In Year 1, the School Leadership Team includes the Executive Director, Director of Community Engagement, and Dean of Curriculum and Instruction (DCI). The Dean of Curriculum Instruction’s primary focus is implementation of the curriculum and assessment system and support of instructional implementation. In addition to managing the work of the DCI, the Executive Director will establish and maintain the school’s cultural infrastructure for students and colleagues by defining objectives and clear rationale for every aspect of school operations, systems and procedures, and training staff to effective and consistent implementation. An Office Manager will provide administrative support with the implementation of operational systems. To assist with reaching enrollment goals and connecting to the community in which the school is located, we will hire a Director of Community Engagement to implement our outreach strategy. The Executive Director will assume responsibilities of logistics, operations, project management, and overall staff supervision.

**Teachers.** In Year 1, Vanguard Collegiate will hire a total of six (6) 5<sup>th</sup> and 6<sup>th</sup> grade teachers. We will also hire one (1) dual-certified, Highly-Qualified Student Supports Coordinator to manage our Special Education and ELL caseload. Our model allows each teacher to specialize in and teach one subject. We will employ two (2) ELA teachers that teach Reading, Writing, and Reading Power Hour to one grade level each and two (2) math teachers that each also focus on one grade level. In our first year, Science (1) and Social Studies teachers (1) will teach both 5<sup>th</sup> and 6<sup>th</sup> grade as well as teach our co-curricular courses. Teachers will be assigned specific core-curricula courses based upon education, skill, and interest.

**Support Staff.** The Office Manager will provide administrative support in areas such as, but not limited to, data collection, records maintenance, guest(s) reception. The Community Engagement Coordinator Year 1 hiring will also include one (1) part-time Food Service Worker and to procure a vendor for our janitorial service needs.

**Organizational Chart.** Figure 12.1 outlines the organizational structure. It is both fiscally conservative and flexible to meet the needs of the school and upon authorization will be approved formally by the Governing Board. The Year 1 enrollment goal is 120 scholars. As Vanguard Collegiate’s capacity expands, so, too, will the development of the school’s organizational chart.

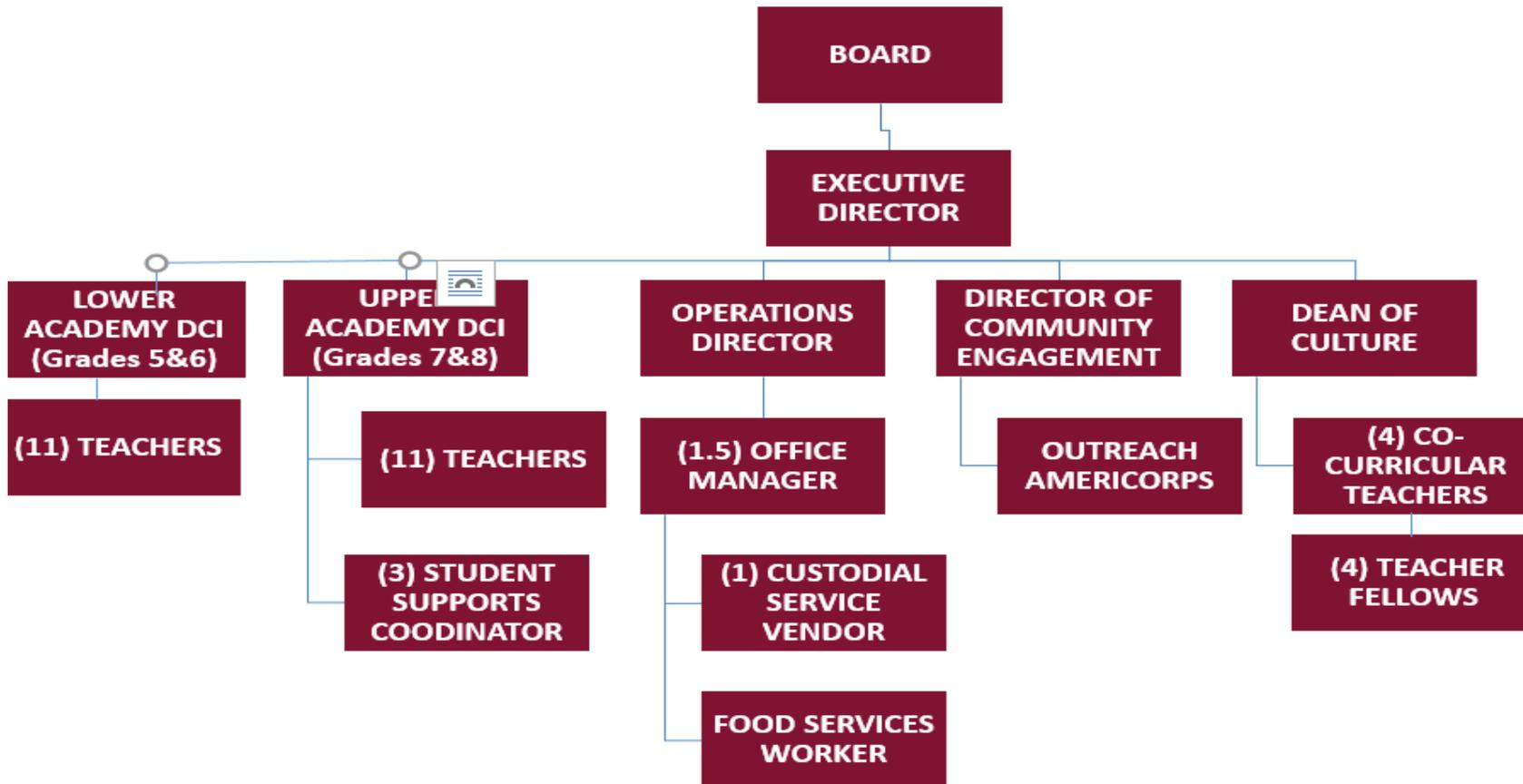
Figure 12.1: Year 1 Organizational Chart



**Year 5 Organization Chart.**

In Year 5, expected enrollment is 480 students; the staff increases to 41.5 FTEs. While our administrative team has grown, specifically to allow for a Lower and Upper Academy Dean Curriculum and Instruction<sup>1</sup>, the largest increase is to our teaching staff.

Figure 12.2: Year 5 Organizational Chart



<sup>1</sup> Current planning is for each DCI to own two grade levels; however, we reserve the right to adjust this to perhaps having one DCI oversee humanities and the other mathematics and science.



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 13**

## **Start-up Plan**

**Attachment 13: Provide a detailed start-up plan for the period leading up to the first day of student attendance for the proposed school, which includes:**

- a. The targeted first day (month, day, year) of student attendance
- b. Specific planning tasks by month, and the individuals responsible for each task.

**First Day of School.** On August 1, 2018, Vanguard Collegiate of Indianapolis will open with 120 fifth grade students.

Task / Planning / Timeline		Key											Ownership Level									
		Roles						Ownership Level														
		BOD = Board of Directors; ED = Executive Director School; DCI = Dean of Curriculum & Instruction; DCE = Director of Community Engagement; BOP = Back Office Provider; BES = Building Excellent Schools						P = Primary; S = Secondary; C = Consultant														
		BOD	ED	DCI	DCE	BOP	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Student Recruitment &amp; Admissions</b>																						
Draft recruitment plan			P		S		C	X														
Design marketing materials (flyers/door signs/etc.)			P		S			X														
Design and launch website			P							X												
Post flyers and leaflets in community			P		S					X												
Post flyer on website			P		S																	
Identify community orgs to help w/ awareness		S	P	S	S			X														
Work with community orgs to generate awareness		S	P	S	S			X														
Multi-media recruitment campaign (paid marketing efforts such as billboards, bus panels, radio and social media ads)			P	S	S																	
Claim all social media accounts on behalf of VC			P																			
Develop communications calendar			P		S			X														
<b>Enrollment Form</b>																						
Design student enrollment form			P					C	X													
Make enrollment form available			P		S																	
Post enrollment form on website and link to forms via social media			P		S																	
<b>Information Sessions and Canvassing</b>																						
Mobilize volunteers for canvassing			S	S	P			X														
Hold monthly canvassing			S	S	P			X	X	X												
Secure locations for information sessions			P		S				X	X												
Secure translator for specific info sessions			S		P					X												
EDt information sessions			P	S	S				X	X												





Close loan with project lender (if necessary)	P																			
Project construction on tenant and site improve.	P																			
FFE selection and procurement	P																			
Obtain Certificate of Occupancy	P																			
Obtain property insurance	P																			
Staff and furniture move-in	P	S			S															
<b>Governance</b>																				
Move from Founding to Governing Board	P																			
Ratify By-Laws, COI, and Code of Ethics	S																			
Define role of Board members	S																			

Define relationship of Board and ED	P	S																		
Define communication methods	P	S																		
Define decision-making processes	P	S																		
Draft polices	P	S																		
Arrange Board liability insurance	P	S																		
Develop Board calendar	P	S							X											
Apply for 501c3	S	P							X											
<b>Board Structure</b>																				
Create job description for full board and adopt	P	S							X											
Create job description for each of the officers, adopt and elect officers	P	S																		
Create job description for each committee chair and each committee. Adopt as policy	P	S																		
Complete Board member background checks and submit to ICSB	P	S																		
Finalize and approve standards of conduct for Board members	P	S																		
Finalize and approve Board member handbook	P	S																		
<b>Board Meetings</b>																				
Set day and time for board meetings. Follow postings for Open Meeting Law	P	S																		
Develop agenda format	P	S																		
Develop consistent format for board meeting packets (released to full board a week in advance)	P	S																		
Develop checklist that Board members could use to evaluate each board meeting and use tool	P	S																		



Task / Planning / Timeline	BOD	ED	DCI	DCE	BOP	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Family Outreach</b>																					
Write family letter re: Parent Orientation		P			S																
Mail family letter re: Parent Orientation		S	S		P																
Complete family (all) visits		P	S		S																
Prepare pre-opening Parent Orientation protocol and materials		P	S		S	C															
Hold pre-opening Parent Orientation		P	S		S																
<b>Curriculum, Teaching and Learning</b>																					
<b>Curriculum Development</b>																					
Determine instructional vision for the school		P					X														
Site visits and analysis of “best practice” charter and public school models		P	S			C	X														
Attend national and local educational conferences		P	S																		
Create plan to ensure instructional program aligns with mission/values		P	S																		
Identify preliminary models for core subjects		P	S																		
Finalize all instructional staff job descriptions		P	S																		
Create and finalize curriculum plans and timelines		P	S																		
Create benchmarks aligned with state standards and curriculum frameworks		P	S																		
Create scope and sequence for each subject		P	S																		
Create and finalized Unit 1 plans for all core content		S	P																		
Create and finalized Unit II plans for all core content		S	P																		
<b>Procurement</b>																					
Purchase materials and textbooks		S	P																		
Purchase Chromebooks and supporting materials		P	S																		
Contract with NWEA MAP, STEP		P	S																		
Purchase standardized testing materials		S	P																		
Purchase Achieve 3000		P	S																		
<b>Assessment</b>																					
Define assessment strategy and timeline		P	P																		
Create diagnostic assessment and tools for data analysis		S	P																		
Conduct diagnostic testing for all students		S	P																		

Enter data from baseline tests		S	P																
Create interim assessments – math and reading		S	P																
Create interim assessments – science, social studies, and writing		S	P																
<b>Instructional Program</b>																			
Finalize student handbook			P	S															
Approve student handbook	P		S																
Finalize school calendar			P																
Develop class configuration			P	S															
Organize Morning Motivation			P	S															
<b>Special Education (supported by CSS and INI)</b>																			
Recruit and hire SPED Support Specialist			P	S															
Identify and secure specific texts and materials			P																
Consult with SPED admin at Marion University			P																
Identify special education student population			P																
Acquire student records – IEP			P	S															
Develop IEPs – if needed (update and review)			P																
Define service requirements for all SPED students			P	S															
<b>School Culture and Climate</b>																			
Determine school wide behavioral expectations			P																C
Determine expectations for whole school routines			P																C
Finalize daily schedule			P																C
Finalize discipline policy			P																C
Develop special rituals/routines			P																C
Create staff cultural binders defining all routines and systems			S																C
Create student culture orientation			P																C
Develop Community Circle curricula			P	S															C
<b>After School Program</b>																			
Contact after school partners	S		P	S			S												X
Apply for after school grants	S		P																
<b>Financial Management</b>																			
Codify the fiscal controls and financial policies the school will employ to track daily operational finances	P																		C
Identify check signers	P		S																C
Identify check writers	P		S																C
Define signature policies	P		S																C



Task / Planning / Timeline	BOD	ED	DCI		DCE	BOP	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018	
Design process forms (purchase orders, expense forms) & policy		P				C																	
Appoint Treasurer		P						X															
Develop segregation of funds policy (public/private)		P				C																	
Establish payroll		P				C																	
Develop schedule of Board financial reviews		P				C																	
Approve fiscal policy manual		P				C																	
Bid and hire back office service provider	P	S																					
Develop chart of accounts to track income, expenses, assets, liabilities, cash flows	S	S				P																	
Set up bank accounts	S	P				C																	
Define investment/savings strategy (where will excess funds be place)	S	P				C																	
Finalize cash flow plan	S	P				C																	
<b>Personnel</b>																							
Develop org chart and job descriptions		P																					
Develop staff handbook	S	P				C	C			X													
Put together a literature packet on the school with information on: 1. Teaching calendar; 2. Professional development opportunities; 3. School mission		P					C																
Design the interview process (look at models)		P	S				C																
Finalize compensation and benefits packages	S	P				C																	
Design a filing/documentation process.		P				C																	
Identify potential recruitment opportunities		P					C																
Advertise/spread job descriptions through local and online channels		P																					
Recruit and hire Deans		P					C																
Recruit and hire SPED Support Specialist		P	S				C																
Recruit and hire Office Manager		P					C																
Recruit and hire Director of Community Engagement		P					C																
Recruit and hire Teachers		P	S				C																
Perform background checks on employees		P																					





Secure a printer	P			C																
Submit edited copy to printer	P																			
Distribute final copies to parent	S			P																
<b>Communication</b>																				
Design school logo	P									X										
Create branding guidelines	P																			
Create or identify a pro-bono graphic designer to create website	P									X										
Set up nonprofit mailing status with Post Office	P																			
Develop filing system to store student academic, disciplinary, and health records	P																			
Define how information will flow within school	P																			
Define procedure for visitors entering building	P	S																		
Develop forms necessary to track and monitor visitors	P																			
Define how staff will communicate (email, walkie-talkie, phones)	P	S																		
Set up phone systems and answering services	P																			
<b>Purchasing</b>																				
Create a comprehensive list of all items that need to be purchased through Dec. of Y1	P																			
Purchase classroom equipment and furniture	P																			
Purchase office equipment and furniture	P																			
Purchase postage meter	P																			
Purchase restroom supplies	P																			
Purchase cleaning products	P																			
Purchase classroom library materials	P	S																		
Purchase arts materials	P	S																		
Purchase PE equipment	P	S																		
Purchase medical supplies	P																			
Purchase classroom technology	P	S																		
Purchase office supplies	P																			
Purchase PA/communication system	P																			



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 14**

## **Insurance Coverage**



March 3, 2017

RE: Vanguard Collegiate of Indianapolis

To Whom It May Concern:

Thurston Springer is proud to have been selected to provide insurance coverage for Vanguard Collegiate of Indianapolis.

For 33 years, Thurston Springer has provided financial planning services to clients nationwide. Over the last 18 months, our firm expanded operations to include an insurance division which provides services for Personal (Home/Auto) and Commercial (Non-Profit/For-Profit businesses) Lines Insurance. Thurston Springer's insurance division is able to write and bind policies in both Indiana and Ohio at this time.

Thurston Springer Insurance utilizes multiple carriers in which to place potential clients for both Business and Personal needs. Per program requirements for Vanguard Collegiate, coverage will only be placed with companies that have an AM Best Rating of, "A".

With regard to Vanguard Collegiate of Indianapolis, the following coverages could be obtained to meet all Indiana Charter School Board (ICSB) requirements:

**Workers Compensation:** Liability coverage for all employees as required by Indiana law.

**Commercial General Liability:** Commercial General Liability in an occurrence form, limits will meet \$1,000,000 per occurrence and \$2,000,000 aggregate for Bodily Injury (BI), Personal Injury (PI) and Property Damage liability coverage. Liability will include: all premises and operations, products/completed operations, independent contractors, separation of insureds, defense and contractual liability. Such comprehensive general liability insurance will expressly cover sexual abuse and molestation liability and medical payments of at least \$5,000. The ICSB and the Indiana Department of Education (IDOE) will be named as an Additional Insured on a primary, non-contributory basis for any liability arising directly or indirectly from all school business, including school-sanctioned functions that may take place outside of normal school hours. As noted above, a copy of the endorsement reflecting these additions will be submitted to the ICSB.

**Educators' Legal Liability:** (including Directors' and Officers' and Employment Practices Liability): Liability insurance covering the school and its directors and officers from liability claims arising from wrongful acts, errors or omissions with regard to the conduct of their duties related to operation and management of the school with limits of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate.

**Automobile Liability:** Coverage is required when any motor vehicle (whether owned, non-owned or hired) is used in connection with all school business, including school-sanctioned functions that may take place outside of normal school hours, with limits of not less than \$1,000,000 per occurrence for BI and PD. **Such liability insurance provides coverage for the school only.** I encourage Vanguard Collegiate to establish policy whereby any school employee who drives a personally-owned vehicle for school-





related business (including field trips/conferences, etc.) to have personal auto coverage that is rated for, “Business Use”. Liability on each policy should be set at \$500,000. Purchase of a Personal Umbrella Policy is also suggested in the amount of at least \$1,000,000. Furthermore, all such employees should be required to provide Certificates of Insurance (C.O.I.) to keep on file at the school. Proof in the form of a Declaration Page should be submitted at each policy renewal (6 or 12 month term) or if the employee changes insurance carriers. **Thurston Springer will provide coverage counseling at no additional fee for employees that request assistance.**

**Umbrella/Excess Liability:** Umbrella or Excess Liability Insurance with limits of not less than \$4,000,000 to provide additional limits for underlying general, automobile, employers’ and educators’ legal liability.

**Property Insurance:** Property insurance from an A-Rated insurance carrier for full Replacement Cost of property, whether by lease or other agreement, from physical loss or damage. Such insurance will cover boiler and machinery exposures and business interruption/extra expense losses. Should Vanguard Collegiate of Indianapolis lease its property, the ICSB will accept insurance in the name of either the school or the property owner.

**Student Accident Coverage:** All Indiana High School Athletic Association (IHSAA) schools require coverage this coverage for athletic participation. Through dialogue with Program Director, Robert Marshall this coverage will not be needed for at least 2 years.

**Employee Dishonesty Liability:** Employee Dishonesty liability insurance in the amount of at least \$250,000 will be acquired for all school employees. Please remember, Indiana has specific fidelity bond requirements for certain school employees. Each limit set by the state will either be met or exceeded.

**Cyber Liability:** Vanguard Collegiate of Indianapolis will have the opportunity to purchase Cyber Liability insurance depending upon the school technology model.

**Foreign Travel/Field Trip Liability:** Vanguard Collegiate may wish to obtain liability insurance covering field trips/foreign travel. Again, this coverage hinges on the program model and lesson plans.

**In addition, Thurston Springer is aware that contracting with Educational Management Organization Charter Schools authorized by the ICSB must factor in the following requirements:**

**Service Agreement:** The service agreement between the charter school and the EMO must require the school to be named as an Additional Insured on the EMO's liability policies.

**EMO:** The EMO must obtain liability insurance coverage from an A-Rated carrier naming the ICSB and the IDOE as Additional Insured on a primary, non-contributory basis. As noted above, a copy of the endorsement reflecting these additions will be submitted to the ICSB.

**Workers Compensation:** WC insurance that complies with state law must be carried by whichever entity employs the school’s staff. If both the school and the EMO employ staff, then each entity must carry the appropriate insurance coverage for their respective employees. If the school does not employ any of the





staff or administration and does not carry workers' compensation insurance, then the service agreement between the charter school and the EMO must include a provision to indemnify the school against any liability for workers' compensation claims.

**Year One Premium Projection:**

*Figures based off of information obtained from Robert Marshall.*

Workers Compensation/Employers Liability:	\$6,100 (Based on 35 Employees)
Commercial General Liability:	\$1,700
Educators Legal Liability:	\$3,500
Automobile Liability:	\$350 (Based on no owned autos)
Umbrella Liability:	\$5,000
Property Insurance:	\$3,500-\$7,000

Through conversation, Leasing was given to me as the most likely option for Vanguard Collegiate. Range of price is due to an unknown location (zip codes play a role in determining price) and an unknown value of building (Property Insurance Premium is dictated by Replacement Cost of the building and other policy coverage requirements of the Leasing Company which may be totally separate of ICSB standards).

Employee Dishonesty Liability:	\$1,500
Cyber Liability:	\$1,500
D&O:	\$4,000
Law Enforcement Professional:	\$750
Foreign Travel Liability:	\$1,000
<b>Total: \$28,900 to \$32,400</b>	

*(Price can fluctuate higher or lower depending on Liability amounts and Deductibles selected for each coverage.)*

**Please note: Market Conditions for School Policies change quarterly based on "loss" statistics industry-wide. Projection of insurance rates for the Fall of 2018 comes with a high degree of variability. This letter in no way guarantees future coverage, nor should it be considered an insurance policy.**

Should you have any questions regarding this letter and or price projections, please feel free to reach out to me at your earliest convenience.

Sincerely,

Phil Lovison  
Property and Casualty Manager  
[plovison@thurstonspringer.com](mailto:plovison@thurstonspringer.com)  
m: 317.379.8201





VANGUARD COLLEGIATE  
OF INDIANAPOLIS

**Attachment 15**  
**Budget and Staffing**  
**Workbook**

## **INDIANA CHARTER SCHOOL BOARD**

### 5-Year Pro Forma Budget Submission Template

#### **General Instructions for New School Applicants**

- Complete the School Enrollment Projection tab in ORANGE
  - Complete the Year 0 - Budget and Cash Flow tab in PURPLE
  - Complete ALL FIVE annual budget tabs in BLUE
  - Complete ALL FIVE staffing tabs in GREEN
  - Enter information into the WHITE cells
  - Do not enter information into the GREY cells
- NOTE: Applicants proposing to operate a network of schools should add a worksheet or attach consolidated network's 5-Year pro-forma budget, reflecting all components - including the region of the Indiana network.
- We encourage applicants to contact the Indiana Department of Education Office of School Finance for information on Indiana's funding formula and all grant and operating funds available. Visit <http://www.doe.in.gov> for more information.

a separate file reflecting the  
ial back office/central office -

ance to learn more about  
**ov/idoe/finance** for more

## SCHOOL ENROLLMENT PROJECTIONS

Planned Number of Students									
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8
Year 1	0	0	0	0	0	60	60	0	0
Year 2	0	0	0	0	0	120	60	60	0
Year 3	0	0	0	0	0	120	120	60	60
Year 4	0	0	0	0	0	120	120	120	60
Year 5	0	0	0	0	0	120	120	120	120

Planned Number of Classes									
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8
Year 1	0	0	0	0	0	2	2	0	0
Year 2	0	0	0	0	0	4	2	2	0
Year 3	0	0	0	0	0	4	4	2	2
Year 4	0	0	0	0	0	4	4	4	2
Year 5	0	0	0	0	0	4	4	4	4

**Note: FDK students are treated as 1 for purposes of ADM. 1/2 day kindergarten students are**

	2016	2017
Foundation Grant	\$ 4,967	\$ 5,088
Complexity Grant	\$ 3,489	\$ 3,539

9	10	11	12	TOTAL	% ELL	% SPED	% SNAP, TANF or Foster Care
0	0	0	0	120	10%	10%	78%
0	0	0	0	240	10%	10%	78%
0	0	0	0	360	10%	10%	78%
0	0	0	0	420	10%	10%	78%
0	0	0	0	480	10%	10%	78%

9	10	11	12	TOTAL
0	0	0	0	4
0	0	0	0	8
0	0	0	0	12
0	0	0	0	14
0	0	0	0	16

**0.5 ADM**

Vanguard Collegiate of Indianapolis						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>REVENUE</b>						
<b>State Revenue</b>						
Basic Grant		\$ 642,240	\$ 1,284,480	\$ 1,926,720	\$ 2,247,840	\$ 2,568,960
State Matching Funds for School Lunch Program		\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development		\$ -	\$ -	\$ -	\$ -	\$ -
Technology Grants		\$ -	\$ -	\$ -	\$ -	\$ -
Remediation Program		\$ -	\$ -	\$ -	\$ -	\$ -
Gifted and Talented Program		\$ -	\$ -	\$ -	\$ -	\$ -
Textbook Reimbursement		\$ -	\$ -	\$ -	\$ -	\$ -
Summer School		\$ -	\$ -	\$ -	\$ -	\$ -
Charter and Innovation Network School Grant Program		\$ 60,000	\$ 120,000	\$ -	\$ -	\$ -
Charter and Innovation Network School Advance Program		\$ -	\$ -	\$ -	\$ -	\$ -
Complexity Grant		\$ 276,042	\$ 552,084	\$ 828,126	\$ 966,147	\$ 1,104,168
Special Education Funding for students with severe disabilities and mild/moderate		\$ 34,100	\$ 68,200	\$ 108,800	\$ 122,600	\$ 142,900
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant	\$ -	\$ -	\$ -			
Public Law 101-476 (IDEA)		\$ 6,233	\$ 12,466	\$ 18,698	\$ 21,815	\$ 24,931
Title I		\$ 37,627	\$ 75,254	\$ 112,882	\$ 131,695	\$ 150,509
Title II		\$ 3,744	\$ 7,488	\$ 11,232	\$ 13,104	\$ 14,976
Federal Lunch Program		\$ 55,740	\$ 111,480	\$ 167,219	\$ 195,089	\$ 222,959
Federal Breakfast Reimbursement		\$ 36,075	\$ 72,150	\$ 108,225	\$ 126,263	\$ 144,300
Federal Snack Reimbursement	\$ -	\$ 14,279	\$ 28,558	\$ 42,837	\$ 49,977	\$ 57,116
E-Rate	\$ -	\$ 3,360	\$ 3,461	\$ 3,565	\$ 3,672	\$ 3,782
<b>Other Revenues</b>						
Committed Philanthropic Donations	\$ 325,000	\$ 75,000	\$ -	\$ -	\$ -	\$ -
Before and After Care Fees		\$ -	\$ -	\$ -	\$ -	\$ -
Interest Income		\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Revenue</b>	<b>\$ 325,000</b>	<b>\$ 1,244,440</b>	<b>\$ 2,335,620</b>	<b>\$ 3,328,304</b>	<b>\$ 3,878,201</b>	<b>\$ 4,434,601</b>
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Wages, Benefits and Payroll Taxes	\$ 156,471	\$ 668,967	\$ 1,242,711	\$ 1,964,426	\$ 2,199,091	\$ 2,576,946
Substitute Teachers		\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development	\$ 800	\$ 3,450	\$ 6,489	\$ 10,503	\$ 11,965	\$ 14,013
Bonuses		\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Personnel Expenses</b>	<b>\$ 157,271</b>	<b>\$ 672,417</b>	<b>\$ 1,249,200</b>	<b>\$ 1,974,929</b>	<b>\$ 2,211,056</b>	<b>\$ 2,590,958</b>
<b>Instructional Supplies and Resources</b>						
Textbooks	\$ 20,000	\$ -	\$ 24,720	\$ 38,192	\$ 45,895	\$ 54,024
Library, periodicals, etc	\$ -	\$ 3,000	\$ 6,180	\$ 9,548	\$ 11,474	\$ 13,506
Technology	\$ -	\$ 288	\$ 541	\$ 875	\$ 997	\$ 1,168
Assessment materials	\$ -	\$ 2,400	\$ 4,944	\$ 7,638	\$ 9,179	\$ 10,805
Computers	\$ 24,000	\$ -	\$ 22,866	\$ 23,552	\$ 36,129	\$ 35,359
Software	\$ -	\$ 3,000	\$ 6,180	\$ 9,548	\$ 11,474	\$ 13,506
Other classroom supplies	\$ -	\$ 12,000	\$ 24,720	\$ 38,192	\$ 45,895	\$ 54,024
Field trips, other unclassified items	\$ -	\$ 2,400	\$ 4,944	\$ 7,638	\$ 9,179	\$ 10,805
Co-curricular & Athletics	\$ -	\$ 4,200	\$ 8,652	\$ 13,367	\$ 16,063	\$ 18,909
ELL Materials	\$ -	\$ 600	\$ 1,236	\$ 1,910	\$ 2,295	\$ 2,701
SPEL Materials	\$ -	\$ 600	\$ 1,236	\$ 1,910	\$ 2,295	\$ 2,701
Curriculum	\$ 15,000	\$ 30,000	\$ 15,000	\$ -	\$ -	\$ -
Uniforms	\$ -	\$ 3,000	\$ 6,180	\$ 9,548	\$ 11,474	\$ 13,506
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Instructional Supplies and Resources</b>	<b>\$ 59,000</b>	<b>\$ 61,488</b>	<b>\$ 127,399</b>	<b>\$ 161,920</b>	<b>\$ 202,347</b>	<b>\$ 231,015</b>
<b>Support Supplies and Resources</b>						
Administrative Computers	\$ 8,500	\$ -	\$ 8,755	\$ 10,821	\$ 3,715	\$ 4,783
Administrative Software	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Administration Dues, fees, misc expenses	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
Office supplies	\$ 1,200	\$ 4,800	\$ 4,944	\$ 5,092	\$ 5,245	\$ 5,402
Copier Supplies	\$ -	\$ 2,400	\$ 4,944	\$ 7,638	\$ 9,179	\$ 10,805
Medical Supplies	\$ -	\$ 300	\$ 309	\$ 318	\$ 328	\$ 338
Custodial Supplies	\$ -	\$ 3,000	\$ 6,180	\$ 9,548	\$ 11,474	\$ 13,506
Background Fees	\$ 135	\$ 450	\$ 464	\$ 573	\$ 197	\$ 253
Copier Leases	\$ -	\$ 4,200	\$ 8,652	\$ 8,912	\$ 9,179	\$ 9,454
<b>Total Support Supplies and Resources</b>	<b>\$ 10,335</b>	<b>\$ 15,650</b>	<b>\$ 34,748</b>	<b>\$ 43,403</b>	<b>\$ 39,816</b>	<b>\$ 45,042</b>
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreats	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
Charter Board Supplies & Equipment	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600
Charter Board Dues, fees, etc	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Board Expenses</b>	\$ 1,100	\$ 1,100	\$ 1,100	\$ 1,100	\$ 1,100	\$ 1,100	\$ 1,100
<b>Professional Purchased or Contracted Services</b>							
Legal Services	\$ 5,000	\$ 5,000	\$ 5,000	\$ 10,000	\$ 10,000	\$ 15,000	
Audit Services (compliant with SBOA requirements)	\$ -	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	\$ 9,000	
Payroll Services	\$ 504	\$ 1,777	\$ 2,018	\$ 2,324	\$ 2,413	\$ 2,540	
Accounting Services	\$ 5,000	\$ 60,000	\$ 60,000	\$ 65,000	\$ 65,000	\$ 65,000	
Printing/Newsletter/Annual Report Services	\$ 1,200	\$ 1,200	\$ 1,236	\$ 1,311	\$ 1,433	\$ 1,613	
Consultants	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
Internet Services	\$ -	\$ 2,400	\$ 2,472	\$ 2,546	\$ 2,623	\$ 2,701	
Telephone/Telecommunication Services	\$ -	\$ 1,800	\$ 1,854	\$ 1,910	\$ 1,967	\$ 2,026	
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ -	\$ 21,000	\$ 24,720	\$ 27,583	\$ 30,596	\$ 33,765	
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Postage	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	
Special Education Services	\$ -	\$ 3,600	\$ 7,416	\$ 11,458	\$ 13,768	\$ 16,207	
Student Information Services	\$ -	\$ 10,840	\$ 1,730	\$ 2,673	\$ 3,213	\$ 3,782	
Food service	\$ -	\$ 112,068	\$ 230,860	\$ 356,679	\$ 428,609	\$ 504,534	
Transportation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Nursing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (Please Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Staff Recruitment, Student Recruitment, & Marketing	\$ 19,000	\$ 17,500	\$ 31,180	\$ 31,048	\$ 33,974	\$ 33,506	
Americorps	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Technology Services	\$ 2,400	\$ 4,400	\$ 4,532	\$ 4,668	\$ 4,808	\$ 4,952	
<b>Total Professional Purchased or Contracted Services</b>	\$ 44,304	\$ 261,785	\$ 393,219	\$ 537,400	\$ 618,603	\$ 705,827	
<b>Facilities</b>							
Rent, mortgage, or other facility cost	\$ -	\$ 102,600	\$ 211,356	\$ 326,545	\$ 392,398	\$ 461,909	
Furniture & Equipment	\$ 23,000	\$ -	\$ 18,770	\$ 19,048	\$ 9,917	\$ 10,065	
Gas/electric	\$ -	\$ 11,400	\$ 23,484	\$ 36,283	\$ 43,600	\$ 51,323	
Water/ Sewer	\$ -	\$ 2,850	\$ 5,871	\$ 9,071	\$ 10,900	\$ 12,831	
Grounds Keeping	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Maintenance Services	\$ -	\$ 5,700	\$ 11,742	\$ 18,141	\$ 21,800	\$ 25,662	
Custodial	\$ -	\$ 17,100	\$ 35,226	\$ 54,424	\$ 65,400	\$ 76,985	
Waste disposal	\$ -	\$ 2,850	\$ 5,871	\$ 9,071	\$ 10,900	\$ 12,831	
Debt Service for Facilities (Interest Only)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
IFF Fee	\$ 4,400	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Facilities</b>	\$ 27,400	\$ 142,500	\$ 312,320	\$ 472,583	\$ 554,915	\$ 651,605	
<b>Other</b>							
Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Indiana Charter School Board Administrative Fee	\$ -	\$ 19,267	\$ 38,534	\$ 57,802	\$ 67,435	\$ 77,069	
CMO/EMO Fee	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Charter and Innovation Network School Advance Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Interest Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Escrow account for dissillusionment / closure	\$ -	\$ -	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Other</b>	\$ -	\$ 19,267	\$ 48,534	\$ 67,802	\$ 77,435	\$ 77,069	
<b>Total Expenditures</b>	\$ 299,410	\$ 1,174,207	\$ 2,166,520	\$ 3,259,137	\$ 3,705,273	\$ 4,302,615	
<b>Carryover/Deficit</b>	\$ 25,590	\$ 70,233	\$ 169,101	\$ 69,167	\$ 172,928	\$ 131,986	
<b>Cumulative Carryover/(Deficit)</b>	\$ 25,590	\$ 95,823	\$ 264,924	\$ 334,091	\$ 507,019	\$ 639,005	

**Expected New School Annual Operating Budget and Cash Flow Projections – YEAR 0 – Pre-Opening Period**

REVENUE	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	TOTAL 2017	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	TOTAL FIRST HALF 2018
<b>Federal Revenue</b>															
Public Charter School Program (PCSP) Grant (NOTE: this is a competitive grant. Funding is not guaranteed.)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue Federal sources (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue Federal sources (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other Revenues</b>															
Committed Philanthropic Donations	-	-	-	-	-	-	-	-	325,000	-	-	-	-	-	325,000
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Revenue</b>	-	-	-	-	-	-	-	-	<b>325,000</b>	-	-	-	-	-	<b>325,000</b>
<b>EXPENDITURES</b>															
<b>Personnel Expenses</b>															
Wages, Benefits and Payroll Taxes (TOTAL must match "Staffing Year 0")	-	-	-	-	-	-	-	-	55,508	20,193	20,193	20,193	20,193	20,193	156,471
Professional Development	-	-	-	-	-	-	-	-	-	-	-	-	-	800	800
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Personnel Expenses</b>	-	-	-	-	-	-	-	-	<b>55,508</b>	<b>20,193</b>	<b>20,193</b>	<b>20,193</b>	<b>20,193</b>	<b>20,993</b>	<b>157,271</b>
<b>Instructional Supplies and Resources</b>															
Textbooks	-	-	-	-	-	-	-	-	-	-	-	-	-	20,000	20,000
Library, periodicals, etc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Assessment materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Computers	-	-	-	-	-	-	-	-	-	-	-	-	-	24,000	24,000
Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other classroom supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Field trips, other unclassified items	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Co-curricular & Athletics	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
ELL Materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SPED Materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Curriculum	-	-	-	-	-	-	-	-	-	-	-	-	-	15,000	15,000
Uniforms	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Instructional Supplies and Resources</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	<b>59,000</b>	<b>59,000</b>
<b>Support Supplies and Resources</b>															
Administrative Computers	-	-	-	-	-	-	-	-	2,550	-	-	-	-	5,950	8,500
Administrative Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administration Dues, fees, misc expenses	-	-	-	-	-	-	-	-	83	83	83	83	83	83	500
Office supplies	-	-	-	-	-	-	-	-	200	200	200	200	200	200	1,200
Copier Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Medical Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodial Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Background Fees	-	-	-	-	-	-	-	-	135	-	-	-	-	-	135
Copier Leases	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Support Supplies and Resources</b>	-	-	-	-	-	-	-	-	<b>2,968</b>	<b>283</b>	<b>283</b>	<b>283</b>	<b>283</b>	<b>6,233</b>	<b>10,335</b>
<b>Board Expenses</b>															
Charter Board Services, including Board Training, retreats	-	-	-	-	-	-	-	-	500	-	-	-	-	-	500
Charter Board Supplies & Equipment	-	-	-	-	-	-	-	-	100	100	100	100	100	100	600
Charter Board Dues, fees, etc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Board Expenses</b>	-	-	-	-	-	-	-	-	<b>600</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>1,100</b>
<b>Professional Purchased or Contracted Services</b>															
Legal Services	-	-	-	-	-	-	-	-	833	833	833	833	833	833	5,000
Audit Services (compliant with SBOA requirements)	-	-	-	-	-	-	-	-	84	84	84	84	84	84	504
Payroll Services	-	-	-	-	-	-	-	-	200	200	200	200	200	200	1,200
Accounting Services	-	-	-	-	-	-	-	-	833	833	833	833	833	833	5,000
Printing/Newsletter/Annual Report Services	-	-	-	-	-	-	-	-	200	200	200	200	200	200	1,200
Consultants	-	-	-	-	-	-	-	-	-	-	-	-	-	10,000	10,000
Internet Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Telephone/Telecommunication Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Insurance Costs (per ICSB requirements detailed in charter school application)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Travel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Postage	-	-	-	-	-	-	-	-	200	200	200	200	200	200	1,200
Special Education Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Student Information Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Food service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transportation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nursing Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (Please Describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Staff Recruitment, Student Recruitment, & Marketing	-	-	-	-	-	-	-	-	3,167	3,167	3,167	3,167	3,167	3,167	19,000
Americorps	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology Services	-	-	-	-	-	-	-	-	400	400	400	400	400	400	2,400
<b>Total Professional Purchased or Contracted Services</b>	-	-	-	-	-	-	-	-	<b>5,717</b>	<b>5,717</b>	<b>5,717</b>	<b>5,717</b>	<b>5,717</b>	<b>15,717</b>	<b>44,304</b>
<b>Facilities</b>															
Rent, mortgage, or other facility cost	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Furniture & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	23,000	23,000
Gas/electric	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Water/ Sewer	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grounds Keeping	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maintenance Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Waste disposal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Debt Service for Facilities (Interest Only)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
IFF Fee	-	-	-	-	-	-	-	-	4,400	-	-	-	-	-	4,400
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Facilities</b>	-	-	-	-	-	-	-	-	<b>4,400</b>	-	-	-	-	<b>23,000</b>	<b>27,400</b>
<b>Other</b>															
Contingency	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Indiana Charter School Board Administrative Fee (0% in Year 0)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CMO/EMO Fee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Other</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenditures</b>	-	-	-	-	-	-	-	-	<b>69,194</b>	<b>26,293</b>	<b>26,293</b>	<b>26,293</b>	<b>26,293</b>	<b>125,043</b>	<b>299,410</b>
<b>Net Income (Pre-Cash Flow Adjustments)</b>	-	-	-	-	-	-	-	-	<b>255,806</b>	<b>(26,293)</b>	<b>(26,293</b>				

	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	TOTAL 2017	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	TOTAL FIRST HALF 2018
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Financing Activities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NET INCOME	-	-	-	-	-	-	-	-	255,806	(26,293)	(26,293)	(26,293)	(26,293)	(125,043)	25,590
Beginning Cash Balance	-	-	-	-	-	-	-	-	-	255,806	229,513	203,220	176,927	150,633	
ENDING CASH BALANCE	-	-	-	-	-	-	-	-	255,806	229,513	203,220	176,927	150,633	25,590	



Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 642,240	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Gifted and Talented Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ 60,000	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 276,042	product of \$3,539 per student and complexity index, estimated at .6 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 34,100	Total SPED population of 10%
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 6,233	estimated \$519.40 per SPED student count see IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
Title I	\$ 37,627	estimated \$402 per FRL count
Title II	\$ 3,744	estimated \$40 per FRL count
Federal Lunch Program	\$ 55,740	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 36,075	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 14,279	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,360	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 75,000	Board Commitment
Before and After Care Fees		
Interest Income		
Other (please describe)		
<b>Total Revenue</b>	\$ 1,244,440	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 668,967	Use staffing workbook
Substitute Teachers		
Professional Development	\$ 3,450	
Bonuses		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 672,417	

<b>Instructional Supplies and Resources</b>		
Textbooks	\$ -	Materials primarily are open source and any book expenses are accounted for in Line 33
Library, periodicals, etc	\$ 3,000	\$25 per student
Technology	\$ 288	
Assessment materials	\$ 2,400	\$20 per student
Computers	\$ -	\$0 per student
Software	\$ 3,000	\$25 per student
Other classroom supplies	\$ 12,000	\$100 per student
Field trips, other unclassified items	\$ 2,400	\$20 per student
Co-curricular & Athletics	\$ 4,200	\$35 per student
ELL Materials	\$ 600	
SPED Materials	\$ 600	\$27.78 per SPED student
Curriculum	\$ 30,000	\$250 per student
Uniforms	\$ 3,000	\$25 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 61,488	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ -	
Administrative Software		
Administration Dues, fees, misc expenses	\$ 500	
Office supplies	\$ 4,800	\$400 per month
Copier Supplies	\$ 2,400	\$20 per student
Medical Supplies	\$ 300	\$2.5 per student
Custodial Supplies	\$ 3,000	\$25 per student
Background Fees	\$ 450	for new staff members
Copier Leases	\$ 4,200	\$350 per month
<b>Total Support Supplies and Resources</b>	\$ 15,650	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 500	
Charter Board Supplies & Equipment	\$ 600	
Charter Board Dues, fees, etc		
Other (please describe)		
<b>Total Board Expenses</b>	\$ 1,100	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 5,000	
Audit Services (compliant with SBOA requirements)	\$ 9,000	
Payroll Services	\$ 1,777	\$148 month
Accounting Services	\$ 60,000	\$5000 per month
Printing/Newsletter/Annual Report Services	\$ 1,200	
Consultants	\$ 10,000	BES follow on support
Internet Services	\$ 2,400	\$200 per month
Telephone/Telecommunication Services	\$ 1,800	\$150 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 21,000	\$175 per student
Travel		
Postage	\$ 1,200	\$10 per student
Special Education Services	\$ 3,600	\$166.67 per sped student
Student Information Services	\$ 10,840	\$90 per student
Food service	\$ 112,068	\$934 per student
Transportation	\$ -	
Nursing Services	\$ -	\$0 per student
Other (Please Describe)	\$ -	
Staff Recruitment, Student Recruitment, & Marketing	\$ 17,500	
Americorps	\$ -	
Technology Services	\$ 4,400	\$367 per month

<b>Total Professional Purchased or Contracted Services</b>	\$ 261,785	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 102,600	\$9 per square foot
Furniture & Equipment	\$ -	\$0 per student; includes budget for office and classroom furniture
Gas/electric	\$ 11,400	\$1 per square foot
Water/ Sewer	\$ 2,850	\$0.25 per square foot
Grounds Keeping	\$ -	\$0 per square foot
Maintenance Services	\$ 5,700	\$0.5 per square foot
Custodial	\$ 17,100	\$1.5 per square foot
Waste disposal	\$ 2,850	\$0.25 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
<b>Total Facilities</b>	\$ 142,500	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 19,267	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program		No anticipated advance required
Interest Costs		\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Escrow account for disillusionment / closure	\$ -	
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 19,267	
<b>Total Expenditures</b>	\$ 1,174,207	
<b>Carryover/Deficit</b>	\$ 70,233	

Cumulative Carryover/(Deficit)



Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 1,284,480	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Gifted and Talented Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ 120,000	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 552,084	product of \$3,539 per student and complexity index, estimated at .6 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 68,200	Total SPED population of 10%
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 12,466	estimated \$519.40 per SPED student countsee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
Title I	\$ 75,254	estimated \$402 per FRL count
Title II	\$ 7,488	estimated \$40 per FRL count
Federal Lunch Program	\$ 111,480	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 72,150	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 28,558	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,461	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	board committed fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
<b>Total Revenue</b>	\$ 2,335,620	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 1,242,711	<a href="#">Use staffing workbook</a>
Substitute Teachers		
Professional Development	\$ 6,489	
Bonuses		
Other (please describe)		
Other (please describe)		
Other (please describe)		

Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 1,249,200	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 24,720	\$103 per student
Library, periodicals, etc	\$ 6,180	\$25.75 per student
Technology	\$ 541	
Assessment materials	\$ 4,944	\$20.6 per student
Computers	\$ 22,866	\$185 per student
Software	\$ 6,180	\$25.75 per student
Other classroom supplies	\$ 24,720	\$103 per student
Field trips, other unclassified items	\$ 4,944	\$20.6 per student
Co-curricular & Athletics	\$ 8,652	\$36.05 per student
ELL Materials	\$ 1,236	
SPED Materials	\$ 1,236	\$28.61 per SPED student
Curriculum	\$ 15,000	\$63 per student
Uniforms	\$ 6,180	\$26 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 127,399	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 8,755	
Administrative Software		
Administration Dues, fees, misc expenses	\$ 500	
Office supplies	\$ 4,944	\$412 per month
Copier Supplies	\$ 4,944	\$20.6 per student
Medical Supplies	\$ 309	\$1.29 per student
Custodial Supplies	\$ 6,180	\$25.75 per student
Background Fees	\$ 464	for new staff members
Copier Leases	\$ 8,652	\$721 per month
<b>Total Support Supplies and Resources</b>	\$ 34,748	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 500	
Charter Board Supplies & Equipment	\$ 600	
Charter Board Dues, fees, etc		
Other (please describe)		
<b>Total Board Expenses</b>	\$ 1,100	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 5,000	
Audit Services (compliant with SBOA requirements)	\$ 9,000	
Payroll Services	\$ 2,018	\$168 month
Accounting Services	\$ 60,000	\$5000 per month
Printing/Newsletter/Annual Report Services	\$ 1,236	
Consultants	\$ 10,000	BES Follow on Support
Internet Services	\$ 2,472	\$206 per month
Telephone/Telecommunication Services	\$ 1,854	\$155 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 24,720	\$103 per student
Travel		
Postage	\$ 1,200	\$5 per student
Special Education Services	\$ 7,416	\$171.67 per sped student
Student Information Services	\$ 1,730	\$7 per student
Food service	\$ 230,860	\$962 per student
Transportation	\$ -	
Nursing Services	\$ -	\$0 per student
Other (Please Describe)	\$ -	

Staff Recruitment, Student Recruitment, & Marketing	\$ 31,180	
Americorps	\$ -	
Technology Services	\$ 4,532	\$378 per month
<b>Total Professional Purchased or Contracted Services</b>	\$ 393,219	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 211,356	\$9.27 per square foot
Furniture & Equipment	\$ 18,770	\$156 per new student
Gas/electric	\$ 23,484	\$1.03 per square foot
Water/ Sewer	\$ 5,871	\$0.26 per square foot
Grounds Keeping	\$ -	\$0 per square foot
Maintenance Services	\$ 11,742	\$0.52 per square foot
Custodial	\$ 35,226	\$1.55 per square foot
Waste disposal	\$ 5,871	\$0.26 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
<b>Total Facilities</b>	\$ 312,320	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 38,534	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program		
Interest Costs		No anticipated advance required
Escrow account for disillusionment / closure	\$ 10,000	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 48,534	
<b>Total Expenditures</b>	\$ 2,166,520	
<b>Carryover/Deficit</b>	\$ 169,101	

Cumulative Carryover/(Deficit)



**Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1-June 30**

REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 1,926,720	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Gifted and Talented Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ -	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 828,126	product of \$3,539 per student and complexity index, estimated at .6 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 108,800	Total SPED population of 10%
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 18,698	estimated \$519.40 per SPED student countsee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
Title I	\$ 112,882	estimated \$402 per FRL count
Title II	\$ 11,232	estimated \$40 per FRL count
Federal Lunch Program	\$ 167,219	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 108,225	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 42,837	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,565	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	board committed fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,328,304</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		

Wages, Benefits and Payroll Taxes	\$ 1,964,426	Use staffing workbook
Substitute Teachers		
Professional Development	\$ 10,503	
Bonuses		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 1,974,929	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 38,192	\$106.09 per student
Library, periodicals, etc	\$ 9,548	\$26.52 per student
Technology	\$ 875	
Assessment materials	\$ 7,638	\$21.22 per student
Computers	\$ 23,552	\$196 per student
Software	\$ 9,548	\$26.52 per student
Other classroom supplies	\$ 38,192	\$106.09 per student
Field trips, other unclassified items	\$ 7,638	\$21.22 per student
Co-curricular & Athletics	\$ 13,367	\$37.13 per student
ELL Materials	\$ 1,910	
SPED Materials	\$ 1,910	
Curriculum	\$ -	\$0 per student
Uniforms	\$ 9,548	\$27 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 161,920	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 10,821	
Administrative Software		
Administration Dues, fees, misc expenses	\$ 500	
Office supplies	\$ 5,092	\$424.36 per month
Copier Supplies	\$ 7,638	\$21.22 per student
Medical Supplies	\$ 318	\$0.88 per student
Custodial Supplies	\$ 9,548	\$26.52 per student
Background Fees	\$ 573	for new staff members
Copier Leases	\$ 8,912	\$742.63 per month
<b>Total Support Supplies and Resources</b>	\$ 43,403	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 500	
Charter Board Supplies & Equipment	\$ 600	
Charter Board Dues, fees, etc		
Other (please describe)		
<b>Total Board Expenses</b>	\$ 1,100	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 10,000	
Audit Services (compliant with SBOA requirements)	\$ 9,000	
Payroll Services	\$ 2,324	\$194 month
Accounting Services	\$ 65,000	\$5417 per month

Printing/Newsletter/Annual Report Services	\$ 1,311	
Consultants	\$ 10,000	
Internet Services	\$ 2,546	\$212 per month
Telephone/Telecommunication Services	\$ 1,910	\$159 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 27,583	\$77 per student
Travel		
Postage	\$ 1,200	\$3 per student
Special Education Services	\$ 11,458	\$176.82 per sped student
Student Information Services	\$ 2,673	\$7 per student
Food service	\$ 356,679	\$991 per student
Transportation	\$ -	
Nursing Services	\$ -	\$0 per student
Other (Please Describe)	\$ -	
Staff Recruitment, Student Recruitment, & Marketing	\$ 31,048	
Americorps	\$ -	
Technology Services	\$ 4,668	\$389 per month
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 537,400</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 326,545	\$9.55 per square foot
Furniture & Equipment	\$ 19,048	\$106 per new student
Gas/electric	\$ 36,283	\$1.06 per square foot
Water/ Sewer	\$ 9,071	\$0.27 per square foot
Grounds Keeping	\$ -	\$0 per square foot
Maintenance Services	\$ 18,141	\$0.53 per square foot
Custodial	\$ 54,424	\$1.59 per square foot
Waste disposal	\$ 9,071	\$0.27 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 472,583</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 57,802	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program Interest Costs		No anticipated advance required
Escrow account for dissillusionment / closure	\$ 10,000	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 67,802</b>	
<b>Total Expenditures</b>	<b>\$ 3,259,137</b>	
<b>Carryover/Deficit</b>	<b>\$ 69,167</b>	

Cumulative Carryover/(Deficit)



**Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1-June 30**

<b>REVENUE</b>	<b>Amount</b>	<b>Notes</b>
<b>State Revenue</b>		
Basic Grant	\$ 2,247,840	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Gifted and Talented Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ -	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 966,147	product of \$3,539 per student and complexity index, estimated at .6 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 122,600	Total SPED population of 10%
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 21,815	estimated \$519.40 per SPED student countsee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
Title I	\$ 131,695	estimated \$402 per FRL count
Title II	\$ 13,104	estimated \$40 per FRL count
Federal Lunch Program	\$ 195,089	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 126,263	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 49,977	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,672	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	board committed fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,878,201</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		

Wages, Benefits and Payroll Taxes	\$ 2,199,091	Use staffing workbook
Substitute Teachers		
Professional Development	\$ 11,965	
Bonuses		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 2,211,056	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 45,895	\$109.27 per student
Library, periodicals, etc	\$ 11,474	\$27.32 per student
Technology	\$ 997	
Assessment materials	\$ 9,179	\$21.85 per student
Computers	\$ 36,129	
Software	\$ 11,474	\$27.32 per student
Other classroom supplies	\$ 45,895	\$109.27 per student
Field trips, other unclassified items	\$ 9,179	\$21.85 per student
Co-curricular & Athletics	\$ 16,063	\$38.25 per student
ELL Materials	\$ 2,295	
SPED Materials	\$ 2,295	
Curriculum	\$ -	\$0 per student
Uniforms	\$ 11,474	\$27 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 202,347	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 3,715	
Administrative Software		
Administration Dues, fees, misc expenses	\$ 500	
Office supplies	\$ 5,245	\$437.09 per month
Copier Supplies	\$ 9,179	\$21.85 per student
Medical Supplies	\$ 328	\$0.78 per student
Custodial Supplies	\$ 11,474	\$27.32 per student
Background Fees	\$ 197	for new staff members
Copier Leases	\$ 9,179	\$764.91 per month
<b>Total Support Supplies and Resources</b>	\$ 39,816	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 500	
Charter Board Supplies & Equipment	\$ 600	
Charter Board Dues, fees, etc		
Other (please describe)		
<b>Total Board Expenses</b>	\$ 1,100	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 10,000	
Audit Services (compliant with SBOA requirements)	\$ 9,000	
Payroll Services	\$ 2,413	\$201 month
Accounting Services	\$ 65,000	\$5417 per month

Printing/Newsletter/Annual Report Services	\$ 1,433	
Consultants	\$ 10,000	
Internet Services	\$ 2,623	\$219 per month
Telephone/Telecommunication Services	\$ 1,967	\$164 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 30,596	\$73 per student
Travel		
Postage	\$ 1,200	\$3 per student
Special Education Services	\$ 13,768	\$182.12 per sped student
Student Information Services	\$ 3,213	\$8 per student
Food service	\$ 428,609	\$1020 per student
Transportation	\$ -	
Nursing Services	\$ -	\$0 per student
Other (Please Describe)	\$ -	
Staff Recruitment, Student Recruitment, & Marketing	\$ 33,974	
Americorps	\$ -	
Technology Services	\$ 4,808	\$401 per month
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 618,603</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 392,398	\$9.83 per square foot
Furniture & Equipment	\$ 9,917	\$55 per new student
Gas/electric	\$ 43,600	\$1.09 per square foot
Water/ Sewer	\$ 10,900	\$0.27 per square foot
Grounds Keeping	\$ -	\$0 per square foot
Maintenance Services	\$ 21,800	\$0.55 per square foot
Custodial	\$ 65,400	\$1.64 per square foot
Waste disposal	\$ 10,900	\$0.27 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 554,915</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 67,435	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program Interest Costs		No anticipated advance required
Escrow account for dissillusionment / closure	\$ 10,000	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 77,435</b>	
<b>Total Expenditures</b>	<b>\$ 3,705,273</b>	
<b>Carryover/Deficit</b>	<b>\$ 172,928</b>	

Cumulative Carryover/(Deficit)



Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,568,960	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Gifted and Talented Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ -	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 1,104,168	product of \$3,539 per student and complexity index, estimated at .6 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 142,900	Total SPED population of 10%
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 24,931	estimated \$519.40 per SPED student countsee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
Title I	\$ 150,509	estimated \$402 per FRL count
Title II	\$ 14,976	estimated \$40 per FRL count
Federal Lunch Program	\$ 222,959	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 144,300	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 57,116	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,782	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	board committed fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 4,434,601</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		

Wages, Benefits and Payroll Taxes	\$ 2,576,946	Use staffing workbook
Substitute Teachers		
Professional Development	\$ 14,013	
Bonuses		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 2,590,958	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 54,024	\$112.55 per student
Library, periodicals, etc	\$ 13,506	\$28.14 per student
Technology	\$ 1,168	
Assessment materials	\$ 10,805	\$22.51 per student
Computers	\$ 35,359	\$73.66 per student
Software	\$ 13,506	\$28.14 per student
Other classroom supplies	\$ 54,024	\$112.55 per student
Field trips, other unclassified items	\$ 10,805	\$22.51 per student
Co-curricular & Athletics	\$ 18,909	\$39.39 per student
ELL Materials	\$ 2,701	
SPED Materials	\$ 2,701	
Curriculum	\$ -	
Uniforms	\$ 13,506	\$28 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 231,015	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 4,783	
Administrative Software		
Administration Dues, fees, misc expenses	\$ 500	
Office supplies	\$ 5,402	\$450.2 per month
Copier Supplies	\$ 10,805	\$22.51 per student
Medical Supplies	\$ 338	\$0.7 per student
Custodial Supplies	\$ 13,506	\$28.14 per student
Background Fees	\$ 253	for new staff members
Copier Leases	\$ 9,454	\$787.86 per month
<b>Total Support Supplies and Resources</b>	\$ 45,042	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 500	2 trainings/\$500 each
Charter Board Supplies & Equipment	\$ 600	\$100/month
Charter Board Dues, fees, etc		
Other (please describe)		
<b>Total Board Expenses</b>	\$ 1,100	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 15,000	
Audit Services (compliant with SBOA requirements)	\$ 9,000	
Payroll Services	\$ 2,540	\$212 month
Accounting Services	\$ 65,000	\$5417 per month
Printing/Newsletter/Annual Report Services	\$ 1,613	

Consultants	\$ 10,000	
Internet Services	\$ 2,701	\$225 per month
Telephone/Telecommunication Services	\$ 2,026	\$169 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 33,765	\$70 per student
Travel		
Postage	\$ 1,200	\$3 per student
Special Education Services	\$ 16,207	\$187.58 per sped student
Student Information Services	\$ 3,782	\$8 per student
Food service	\$ 504,534	\$1051 per student
Transportation	\$ -	
Nursing Services	\$ -	
Other (Please Describe)	\$ -	
Staff Recruitment, Student Recruitment, & Marketing	\$ 33,506	
Americorps	\$ -	
Technology Services	\$ 4,952	\$413 per month
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 705,827</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 461,909	\$10.13 per square foot
Furniture & Equipment	\$ 10,065	\$56 per new student
Gas/electric	\$ 51,323	\$1.13 per square foot
Water/ Sewer	\$ 12,831	\$0.28 per square foot
Grounds Keeping	\$ -	\$0 per square foot
Maintenance Services	\$ 25,662	\$0.56 per square foot
Custodial	\$ 76,985	\$1.69 per square foot
Waste disposal	\$ 12,831	\$0.28 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 651,605</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 77,069	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program		
Interest Costs		No anticipated advance required
Escrow account for dissillusionment / closure	\$ -	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 77,069</b>	
<b>Total Expenditures</b>	<b>\$ 4,302,615</b>	
<b>Carryover/Deficit</b>	<b>\$ 131,986</b>	

Cumulative Carryover/(Deficit)



Vanguard Collegiate of Indianapolis  
Proposed Charter School Budget  
As of 9/1/2017

Start-Up Year      Year 1      Year 2      Year 3      Year 4      Year 5

	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
	Preliminary Forecast					
<b>SUMMARY</b>						
<b>Revenue</b>						
IDOE Basic Grant	-	642,240	1,284,480	1,926,720	2,247,840	2,568,960
Federal Categorical Funding	-	157,058	310,856	464,658	541,614	618,573
State Categorical Funding	-	370,142	740,284	936,926	1,088,747	1,247,068
Private Grants, Donations, & Fundraising	325,000	75,000	-	-	-	-
<b>Total Revenue</b>	<b>325,000</b>	<b>1,244,440</b>	<b>2,335,620</b>	<b>3,328,304</b>	<b>3,878,201</b>	<b>4,434,601</b>
<b>Expenses</b>						
Salaries & Wages	131,250	544,000	1,007,573	1,585,949	1,768,682	2,068,697
Benefits	25,221	124,967	235,139	378,478	430,408	508,249
Supplies, Materials, & Equipment	72,835	80,638	165,682	208,934	245,896	279,969
Professional Services and Travel	47,104	262,835	397,272	545,392	627,936	717,026
Utilities, Insurance, Rent & Leasehold Improvements	23,000	142,500	312,320	472,583	554,915	651,605
Miscellaneous	-	19,267	48,534	67,802	77,435	77,069
<b>Total Expenses (excluding Capitalization &amp; Depreciation)</b>	<b>299,410</b>	<b>1,174,207</b>	<b>2,166,520</b>	<b>3,259,137</b>	<b>3,705,273</b>	<b>4,302,615</b>
<b>Operating Income (EBIDA)</b>	<b>25,590</b>	<b>70,233</b>	<b>169,101</b>	<b>69,167</b>	<b>172,928</b>	<b>131,986</b>
<b>Fund Balance</b>						
Beginning Balance (Unaudited)	-	25,590	95,823	264,924	334,091	507,019
<b>Ending Fund balance</b>	<b>25,590</b>	<b>95,823</b>	<b>264,924</b>	<b>334,091</b>	<b>507,019</b>	<b>639,005</b>
Operating Income as % of Total Revenues	7.87%	5.64%	7.24%	2.08%	4.46%	2.98%
Fund Balance as % of Revenues	7.87%	7.70%	11.34%	10.04%	13.07%	14.41%
Operating Income as % of Total Expenses	8.55%	5.98%	7.81%	2.12%	4.67%	3.07%
Fund Balance as % of Expenses	8.55%	8.16%	12.23%	10.25%	13.68%	14.85%
Total Revenue Per Student	\$0	\$10,370	\$9,732	\$9,245	\$9,234	\$9,239
Total Spending Per Student	\$0	\$9,785	\$9,027	\$9,053	\$8,822	\$8,964

## Analytics

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
			Change from Prior Year			
IDOE Basic Grant		N/a	100%	50%	17%	14%
Federal Categorical Funding		N/a	98%	49%	17%	14%
State Categorical Funding		N/a	100%	27%	16%	15%
Private Grants, Donations, & Fundraising		N/a	-100%	0%	0%	0%
Total Revenues		N/a	88%	43%	17%	14%
			Change from Prior Year			
Salaries & Wages		N/a	85%	57%	12%	17%
Benefits		N/a	88%	61%	14%	18%
Supplies, Materials, & Equipment		N/a	105%	26%	18%	14%
Professional Services and Travel		N/a	51%	37%	15%	14%
Utilities, Insurance, Rent & Leasehold Improvements		N/a	119%	51%	17%	17%
Miscellaneous		N/a	152%	40%	14%	0%
			% of Spending			
Salaries & Wages	44%	46%	47%	49%	48%	48%
Benefits	8%	11%	11%	12%	12%	12%
Supplies, Materials, & Equipment	24%	7%	8%	6%	7%	7%
Professional Services and Travel	16%	22%	18%	17%	17%	17%
Utilities, Insurance, Rent & Leasehold Improvements	8%	12%	14%	15%	15%	15%
Miscellaneous	0%	2%	2%	2%	2%	2%

Vanguard Collegiate of Indianapolis  
 Revenue & Student Assumptions  
 As of 9/1/2017

	Start-Up Year	Year 1	Year 2	Year 3	Year 4	Year 5		
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Notes	
5th Grade		60	120	120	120	120		
6th Grade		60	60	120	120	120		
7th Grade		0	60	60	120	120		
8th Grade		0	0	60	60	120		
Enrollment		120	240	360	420	480		
Fall ADM Hedge		100%	100%	100%	100%	100%		
Effective Enrollment - Fall ADM		120	240	360	420	480		
Spring ADM Hedge		100%	100%	100%	100%	100%		
Effective Enrollment - Spring ADM		120	240	360	420	480		
School Days		185	185	185	185	185		
Attendance Rate		95%	95%	95%	95%	95%		
Complexity Index		65%	65%	65%	65%	65%	Impact on complexity calculation	
SPED % - Severe		1%	1%	1%	1%	1%		
SPED % - Mild & Moderate		9%	9%	9%	9%	9%		
SPED % - Communication & Homebound		0%	0%	0%	0%	0%		
SPED % - Special Preschool		0%	0%	0%	0%	0%		
SPED Count - Severe		1	2	4	4	5		
SPED Count - Mild & Moderate		11	22	32	38	43		
SPED Count - Communication & Homebound		0	0	0	0	0		
SPED Count - Special Preschool		0	0	0	0	0		
SPED Count - Total		12	24	36	42	48		
ELL %		10%	10%	10%	10%	10%		
ELL Count		12	24	36	42	48		
Paid %		22%	22%	22%	22%	22%		
Reduced %		10%	10%	10%	10%	10%		
Free %		68%	68%	68%	68%	68%		
Breakfast Participation		100%	100%	100%	100%	100%		
Lunch Participation		100%	100%	100%	100%	100%		
Snack Participation		100%	100%	100%	100%	100%		
Annual Revenue Increase		0.0%	0.0%	0.0%	0.0%	0.0%	flat funding environment assumed	
Effective Revenue Increase		100.0%	100.0%	100.0%	100.0%	100.0%		
	<b>Rate</b>							
IDOE Basic Grant Fall	\$5,352	-	321,120	642,240	963,360	1,123,920	1,284,480	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
IDOE Basic Grant Spring	\$5,352	-	321,120	642,240	963,360	1,123,920	1,284,480	\$5,353 per student per Melissa Ambre @ Indiana Department of Education
Title I	\$402	-	37,627	75,254	112,882	131,695	150,509	estimated \$402 per FRL count
Title II	\$40	-	3,744	7,488	11,232	13,104	14,976	estimated \$40 per FRL count

Title III	\$160	-	-	-	-	-	-	likely not enough to receive Title III due to ELL count not triggering \$10K minimum
IDEA	\$519.40	-	6,233	12,466	18,698	21,815	24,931	estimated \$519.40 per SPED student countsee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf">https://www.in.gov/icsb/files/ICSB_StartUp_Manual.pdf</a>
E-Rate	N/A	-	3,360	3,461	3,565	3,672	3,782	E-Rate: 80% of internet & telephone service only
NSLP - Breakfast - Paid	\$0.29	-	1,416	2,833	4,249	4,957	5,665	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Breakfast - Reduced	\$1.74	-	3,863	7,726	11,588	13,520	15,451	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Breakfast - Free	\$2.04	-	30,796	61,592	92,388	107,785	123,183	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Lunch - Paid	\$0.32	-	1,563	3,126	4,689	5,470	6,252	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Lunch - Reduced	\$2.78	-	6,172	12,343	18,515	21,601	24,686	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Lunch - Free	\$3.18	-	48,005	96,011	144,016	168,018	192,021	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Snack - Paid	\$0.07	-	342	684	1,026	1,197	1,368	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Snack - Reduced	\$0.43	-	955	1,909	2,864	3,341	3,818	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
NSLP - Snack - Free	\$0.86	-	12,983	25,965	38,948	45,439	51,930	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Charter & Innovation Network Grant	\$500	-	60,000	120,000	-	-	-	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Special Education -Severe Disabilities	\$8,800	8,800	17,600	35,200	35,200	44,000	44,000	<a href="#">Total estimated sped population of 18%, with estimated 5% of the sped enrollment to have a severe disability generating \$8,800 per qualifying student and 95% of the sped enrollment to have a mild or moderal disability generating \$2,300 per qualifying student:</a>
Special Education -Mild & Moderate	\$2,300	25,300	50,600	73,600	87,400	98,900	98,900	
Special Education -Communication Disorders or Homebound	\$500	-	-	-	-	-	-	<a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Complexity Grant	\$3,539	-	276,042	552,084	828,126	966,147	1,104,168	<a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Centricity/Domain/1/ISBA%20Article%20-%20Funding%20Formula%20-%20edited.docx</a>
Private Grants	N/A	-	-	-	-	-	-	
Walton Grant	N/A	325,000	-	-	-	-	-	
Fundraising	N/A	-	75,000	-	-	-	-	

Vanguard Collegiate of Indianapolis  
Payroll Assumptions  
As of 9/1/2017

	Start-Up Year	Year 1	Year 2	Year 3	Year 4	Year 5	
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Notes

Annual COLA Increase	0.0%	0.0%	3.50%	3.50%	3.50%	3.50%	to account for both COLA and Performance based adjustments
Effective Payroll Increase	100.0%	100.0%	103.5%	107.1%	110.9%	114.8%	

Head of School	0.83	1.00	1.00	1.00	1.00	1.00
Dean of Curriculum & Instruction	0.50	1.00	1.00	1.00	1.00	2.00
Parent Liason	0.50	1.00	1.00	1.00	1.00	1.00
Dean of Culture	0.00	0.00	1.00	1.00	1.00	1.00
Director of Operations	0.00	0.00	1.00	1.00	1.00	1.00
Office Clerk	0.00	1.00	1.00	1.00	1.50	1.50
Cafeteria Assistant	0.00	0.50	1.00	1.00	1.00	1.00
Student Supports Coordinator	0.00	1.00	2.00	3.00	3.00	3.00
Teaching Fellows	0.00	0.00	0.00	0.00	2.00	4.00
Teacher (Type 1)	0.00	3.00	6.00	10.00	12.00	13.00
Teacher (Type 2)	0.00	3.00	6.00	13.00	12.00	13.00
<b>Total # of Staff</b>	1.83	11.50	21.00	33.00	36.50	41.50
Change in Staff Count	1.83	9.67	9.50	12.00	3.50	5.00

	Salary					
Head of School	\$90,000	75,000	90,000	93,150	96,410	99,785
Dean of Curriculum & Instruction	\$72,500	36,250	72,500	75,038	77,664	80,382
Director of Community Engagement	\$40,000	20,000	40,000	41,400	42,849	44,349
Dean of Culture	\$62,500	-	-	64,688	66,952	69,295
Director of Operations	\$55,000	-	-	56,925	58,917	60,979
Office Clerk	\$29,500	-	29,500	30,533	31,601	49,061
Cafeteria Assistant	\$20,000	-	10,000	20,700	21,425	22,174
Student Supports Coordinator	\$47,000	-	47,000	97,290	151,043	156,329
Teaching Fellows	\$25,000	-	-	-	-	55,436
Teacher (Type 1)	\$45,000	-	135,000	279,450	482,051	598,708
Teacher (Type 2)	\$40,000	-	120,000	248,400	557,037	532,185
<b>Total Salaries</b>		131,250	544,000	1,007,573	1,585,949	1,768,682
Substitutes	\$0	-	-	-	-	-
Stipends	\$0	-	-	-	-	-
<b>Total Compensation</b>		131,250	544,000	1,007,573	1,585,949	1,768,682

Medical, Dental, & Vision	\$5,000	9,167	57,500	110,250	181,913	211,267	252,218	average across employees that employer pays; may or may not require some employee subsidization depending on specific employee plan
Annual Increase	0%	0%	5%	5%	5%	5%		
Effective Increase	100.00%	100.00%	105.00%	110.25%	115.76%	121.55%		
SSI	6.20%	8,138	33,728	62,469	98,329	109,658	128,259	
Medicare	1.45%	1,903	7,888	14,610	22,996	25,646	29,996	
Retirement	3.00%	3,938	16,320	30,227	47,578	53,060	62,061	401K or 403B plan; may want to require an employee match to trigger assessed on first \$9,500 per calendar year, IN new employer rate is 2.5%
Unemployment	2.50%	435	2,731	4,988	7,838	8,669	9,856	
Workers Compensation	1.25%	1,641	6,800	12,595	19,824	22,109	25,859	depends on policy rating
FUTA	0.00%	-	-	-	-	-	-	expected to be a 501c3 org

Vanguard Collegiate of Indianapolis  
Expense Assumptions  
As of 9/1/2017

	Start-Up Year	Year 1	Year 2	Year 3	Year 4	Year 5	Notes	
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23		
Enrollment		120	240	360	420	480		
Hedge		100%	100%	100%	100%	100%		
Effective Enrollment		120	240	360	420	480		
School Days		185	185	185	185	185		
Attendance Rate		95%	95%	95%	95%	95%		
SPED %		10%	10%	10%	10%	10%		
Paid %		22%	22%	22%	22%	22%		
Reduced %		10%	10%	10%	10%	10%		
Free %		68%	68%	68%	68%	68%		
Square Footage Per Student		95	95	95	95	95		
Total Square Footage		11,400	22,800	34,200	39,900	45,600		
Buses Required		0	0	0	0	0		
Annual Expense Increase		0.0%	3.00%	3.00%	3.00%	3.00%	To account for inflation/increased costs associated with higher grade levels	
Effective Expense Increase		100.0%	103.0%	106.1%	109.3%	112.6%		
<b>Instructional Supplies &amp; Resources</b>								
Textbooks & Guided Reading	\$100	20,000	-	24,720	38,192	45,895	54,024	textbooks purchased prior to start of school
Class Libraries	\$25	-	3,000	6,180	9,548	11,474	13,506	per student
Educational Software	\$25	-	3,000	6,180	9,548	11,474	13,506	per student
Peripheral Equipment/Networking	\$25	-	288	541	875	997	1,168	
Special Education Technology	\$0	-	-	-	-	-	-	per SPED student
Student Computers	\$185	24,000	-	22,866	23,552	12,129	12,493	computers purchased prior to start of school
Student Computer Replacement	\$185	-	-	-	-	24,000	22,866	3 year replacement cycle
Assessment & Evaluation	\$20	-	2,400	4,944	7,638	9,179	10,805	
Instructional Materials	\$100	-	12,000	24,720	38,192	45,895	54,024	per student
Enrichment Supplies	\$15	-	1,800	3,708	5,729	6,884	8,104	per student
Culture Supplies	\$5	-	600	1,236	1,910	2,295	2,701	per student
Athletic Supplies	\$15	-	1,800	3,708	5,729	6,884	8,104	per student
After School Supplies	\$0	-	-	-	-	-	-	per student
Field Trips	\$20	-	2,400	4,944	7,638	9,179	10,805	per student
ELL Materials	\$50	-	600	1,236	1,910	2,295	2,701	per ELL student
SPED Materials	\$50	-	600	1,236	1,910	2,295	2,701	per SPED student
ELA Curriculum	\$0	-	-	-	-	-	-	per student
Math Curriculum	\$0	15,000	30,000	15,000	-	-	-	initial investment
Science Curriculum	\$0	-	-	-	-	-	-	per student
Social Studies Curriculum	\$0	-	-	-	-	-	-	per student
Uniforms	\$25	-	3,000	6,180	9,548	11,474	13,506	per student
Medical Supplies	\$25	-	300	309	318	328	338	per month
Copier Supplies/Usage	\$20	-	2,400	4,944	7,638	9,179	10,805	per student
Office Supplies	\$400	1,200	4,800	4,944	5,092	5,245	5,402	per month
Custodial Supplies	\$25	-	3,000	6,180	9,548	11,474	13,506	per student
Staff Computers (includes staff software)	\$850	8,500	-	8,755	10,821	3,715	4,783	staff computers purchased prior to start of first year
Fingerprinting/Background	\$45	135	450	464	573	197	253	per new staff member
Memberships	Varies	500	500	500	500	500	500	
Copier Lease	\$350	-	4,200	8,652	8,912	9,179	9,454	
Board Meetings		600	600	600	600	600	600	add new expenses not listed for supplies
Board trainings		500	500	500	500	500	500	add new expenses not listed for supplies
Postage		1,200	1,200	1,200	1,200	1,200	1,200	
Printing		1,200	1,200	1,236	1,311	1,433	1,613	add new expenses not listed for supplies
<b>Total Instructional Supplies and Resources</b>		<b>72,835</b>	<b>80,638</b>	<b>165,682</b>	<b>208,934</b>	<b>245,896</b>	<b>279,969</b>	includes Summer Academy
<b>Professional Services &amp; Travel</b>								
Legal	\$5,000	5,000	5,000	5,000	10,000	10,000	15,000	audit & 990 support; likely to be flat over multiyear engagements
Audit	\$9,000	-	9,000	9,000	9,000	9,000	9,000	
Payroll	Varies	504	1,777	2,018	2,324	2,413	2,540	Outsourced Payroll Processor; \$500 in reporting fees; \$53 for 11 employees per pay period (24); extra \$1 per employee per pay period (24)
Back-Office Support & Financial Consulting	Varies	5,000	60,000	60,000	65,000	65,000	65,000	EdTec
Technology Support	\$200	2,400	2,400	2,472	2,546	2,623	2,701	outsourced tech service vendor
E-Rate Consulting	\$2,000	-	2,000	2,060	2,122	2,185	2,251	based on other schools
Internet	\$200	-	2,400	2,472	2,546	2,623	2,701	
Telephone	\$150	-	1,800	1,854	1,910	1,967	2,026	
Insurance	\$21,000	-	21,000	24,720	27,583	30,596	33,765	to scale with size of school; includes D&O, Liability
Special Education Services	\$300	-	3,600	7,416	11,458	13,768	16,207	per SPED student
SIS System	\$7	-	10,840	1,730	2,673	3,213	3,782	larger one time fee for first year; per student licensing fee in future years
Food Service	\$5.20	-	109,668	225,916	349,040	419,430	493,729	Cost of breakfast, lunch, snack for each student, # of days, and likely attendance %
Food Service Authority Management	\$20	-	2,400	4,944	7,638	9,179	10,805	service cost varies; need to have food service program managed and NSLP claims processed if district doesn't provide; ranges from \$500 to \$2K/month
Student Transportation	\$0	-	-	-	-	-	-	
Health Services	\$0	-	-	-	-	-	-	per student; nursing service
Professional Development (including travel)	\$300	800	3,450	6,489	10,503	11,965	14,013	per staff member

Student Recruitment	\$25	6,000	3,000	6,180	9,548	11,474	13,506	
Staff Recruitment	\$500	5,000	7,500	10,000	6,500	7,500	5,000	per new staff member + 25% attrition \$6k on marketing collateral (swag, table cover, displays, and print materials); \$2k on digital marketing campaigns; \$2k on radio; \$3k on billboard; \$2k on bus ads
Website and Marketing Materials	Varies	8,000	7,000	15,000	15,000	15,000	15,000	
IFF Fee		4,400	-	-	-	-	-	brokerage fee for facilities
Add new expense		-	-	-	-	-	-	
General Consulting		-	-	-	-	-	-	Indiana Youth Institute supplements consulting fees (10hr/month @ \$20/hr.)
BES		10,000	10,000	10,000	10,000	10,000	10,000	follow on support
		-	-	-	-	-	-	
		-	-	-	-	-	-	
<b>Total Professional Services &amp; Travel</b>		<b>47,104</b>	<b>262,835</b>	<b>397,272</b>	<b>545,392</b>	<b>627,936</b>	<b>717,026</b>	
<b>Utilities, Insurance, Rent &amp; Leasehold Improvements</b>								
Operating Lease	\$9.00	-	102,600	211,356	326,545	392,398	461,909	per square foot
Custodial Services	\$1.50	-	17,100	35,226	54,424	65,400	76,985	
Gas/electricity	\$1.00	-	11,400	23,484	36,283	43,600	51,323	per square foot
Water/Sewer	\$0.25	-	2,850	5,871	9,071	10,900	12,831	per square foot
Waste	\$0.25	-	2,850	5,871	9,071	10,900	12,831	per square foot
Facility Improvements	\$0.50	-	5,700	11,742	18,141	21,800	25,662	recurring repairs
Student Desks	\$75	9,000	-	9,270	9,548	4,917	5,065	purchased prior to start of school year
Classroom Furniture	\$1,500	9,000	-	9,000	9,000	4,500	4,500	purchased prior to start of school year
Office Furniture	Varies	5,000	-	500	500	500	500	purchased prior to start of school year
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
<b>Total Utilities, Insurance, Rent &amp; Leasehold Improvements</b>		<b>23,000</b>	<b>142,500</b>	<b>312,320</b>	<b>472,583</b>	<b>554,915</b>	<b>651,605</b>	
<b>Miscellaneous</b>								
Admin Fee	3.00%	-	19,267	38,534	57,802	67,435	77,069	3% of basic grant
Dissolution Escrow	\$10,000	-	-	10,000	10,000	10,000	-	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Contingency	0.00%	-	-	-	-	-	-	2.5% on non payroll expenses
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
		-	-	-	-	-	-	
<b>Total Miscellaneous</b>		<b>-</b>	<b>19,267</b>	<b>48,534</b>	<b>67,802</b>	<b>77,435</b>	<b>77,069</b>	



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

# **Attachment 16**

## **Budget Narrative**

**Attachment 16: Provide a detailed budget narrative that provides a high-level summary of the budget and how the budget aligns with the 5-Year business plan, which should include the following descriptions of assumptions and revenue estimates:**

- a. Per-Pupil Revenue Projections
- b. Staffing Levels
- c. Technology Costs and Facilities Expenses
- d. Specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising)
- e. The school’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget
- f. How the school will ensure it has sufficient funds to cover all anticipated expenses, including but not limited to: (a) start-up costs, (b) any special education costs incurred, (c) any transportation costs necessary to ensure the school will be accessible for all enrolled students, and (d) required retirement plan contributions.

Upon authorization, Vanguard Collegiate will contract back-office functions to national provider, EdTec, for the following full service support services: accounts payable processing, accounting, payroll, and financial statement development. Additionally, EdTec will provide reporting compliance support, budgeting and forecasting, cash flow planning, scenario generation, and financial and operational best practices from their experience working with other charter schools. The Board will approve the contract and the Executive Director and Director of Operations as hired will manage the contract. They will be responsible for working with the back-office provider staff across the various transactional areas to ensure the back-office provider has all the required information to provide services. The various transactional processes and systems have been summarized below by area of service.

Vanguard Collegiate has developed a startup and 5-year budget for the proposed charter school. The multi-year budget was prepared utilizing conservative revenue and expense assumptions whenever possible, with professional consultation from charter school budgeting and finance experts. Each fiscal year, the budget reflects a positive operating income and a growing fund balance to provide the school with opportunity to absorb unforeseen financial circumstances. By the end of the second year, fund balance is approximately equivalent to one month of operating cash and by the fifth year of operations, fund balance is equivalent to over three months of operating cash. **Figure 16.1** details all revenue, expenses, and balances, as well as total revenue and spending per student annually.

**Figure 16.1: Budget Review**

<b>Item</b>	<b>FY 2018</b>	<b>FY 2019</b>	<b>FY 2020</b>	<b>FY 2021</b>	<b>FY 2022</b>	<b>FY 2023</b>
<b>Total Revenue</b>	325,000	1,244,440	2,335,620	3,328,304	3,878,201	4,434,601
<b>Total Expenses</b>	299,410	1,174,207	2,166,520	3,259,137	3,705,273	4,302,615
<b>Operating Income (EBIDA)</b>	25,590	70,233	169,101	69,167	172,928	131,986
<b>Beginning Fund Balance</b>	-	25,590	96,823	264,924	334,091	507,019
<b>Ending Fund Balance</b>	25,590	95,823	264,924	334,091	507,019	639,005
<b>Operating Income as % of Total Revenues</b>	7.87%	5.64%	7.24%	2.08%	4.46%	2.98%

<b>Fund Balance as % of Total Revenues</b>	7.87%	7.70%	11.34%	10.04%	13.07%	14.41%
<b>Total Revenue Per Student</b>	\$0	\$10,370	\$9,732	\$9,245	\$9,234	\$9,239
<b>Total Spending Per Student</b>	\$0	\$9,780	\$9,027	\$9,053	\$8,822	\$8,964

**Per-Pupil Revenue Projections.** The public revenue projections are based on the most recent funding rates and assumptions available to charter applicants, available online, and when otherwise unavailable, the assumptions being used for schools operating during FY 2017 or FY 2018. Vanguard Collegiate also consulted with various individuals working with Indiana charter school funding, as well as prior applicant budgets and available online resources on public school funding in Indiana.

The main per pupil assumption for basic funding used was \$5,353 per student. In addition, Vanguard Collegiate also included an assumption for the Charter & Innovation Grant of \$500 per student for the first two years with the understanding that continued eligibility is predicated on receiving an A, B, or C grade in the state ranking system. The budget includes an assumption of Complexity Grant funding of \$3,539 per student, which was prorated by a factor of 0.65. All the available guidance suggested Vanguard Collegiate could budget for the full \$3,539 per student, but out of conservatism, it has incorporated a hedge of 0.65 to account for the complexity factor.

Vanguard Collegiate included an assumption for state special education funding for various types of need levels. It assumed that special education students constituted 10% of the enrollment in each year, with an estimated 10% of the special education students having a severe disability generating \$8,800 per qualifying student and 90% of special education students having a mild or moderate disability generating \$2,300 per qualifying student.

Vanguard Collegiate budgeted for Title I and Title II allocations, of \$402 and \$40 per qualifying student, respectively, tied to an assumption of qualifying students being free and reduced lunch students estimated at approximately 78%. Vanguard Collegiate also expects to receive IDEA funding at \$519.40 per eligible special education student, as well as an E-Rate reimbursement of telecommunication services at 80%. Vanguard Collegiate has planned also for NSLP revenues and greater than offsetting costs of implementing the National School Lunch Program, as well as the breakfast and snack programs. Revenues have been projected based on assumption around meals serve to eligible students and the FY 2017 federal reimbursement rates, using the anticipated student FRL profile, number of days and attendance rates, and likelihood of participating to project the fiscal impact.

For all revenue assumptions, Vanguard Collegiate did not incorporate any rate increase or inflation year over year. Without more multiyear budget information at the state and federal level, Vanguard Collegiate believes this to be the most conservative budgeting plan.

**Staffing Levels.** Personnel costs, benefit costs, and employer liability costs, are approximately 57% of the anticipated spending during the first 5 years for Vanguard Collegiate, or an average of \$5.4K in spending per student per year. The staffing plan ties to the proposed personnel plan and the phase-in of those positions over time. Vanguard Collegiate used salary ranges from other charter school budgets.<sup>1</sup> The largest staffing category, teachers, has an average salary of \$47K, noting that Vanguard Collegiate will likely have individuals below and above that average depending on experience. Other roles have also been budgeted,

<sup>1</sup> Indianapolis Public Schools' starting teacher salary is \$40,000.

<https://www.myips.org/site/handlers/filedownload.ashx?moduleinstanceid=44580&dataid=24556&FileName=2016-2017%20Teacher%20Salary%20Schedule.pdf>

specifically around administrative functions, food service workers, and electives and teaching fellows. On average, 75% of the proposed personnel spending is towards instructional roles.

When Vanguard Collegiate opens, it plans to have a staff of 11.5 in 2018-19 and grow to a final staff of 41.5 in 2022-23. Salaries are budgeted to increase 3.50% year over year starting 2019-20. This staffing plan represents the minimum level of spending, and Vanguard Collegiate will consistently evaluate if this is adequate.

Vanguard Collegiate has budgeted a 3% assumption for employer contributions to retirement to a private plan such as a 403b or 401k plan. Per IC 20-24-6-7, participation in TRF or PERF appear to be optional if an alternative private plan is offered. However, Vanguard Collegiate may reevaluate this based on interest from staff and financial capacity to afford to the higher employer contribution rates. Vanguard Collegiate has budgeted to contribute, on average, \$5,000 per employee toward medical, dental, and vision benefits, which is assumed to increase year over year by 5%. It also budgeted for Social Security, Medicare, and state unemployment insurance at currently established rates (6.2% of wages, 1.45% of wages, and 2.5% of the first \$9,500 per employee). Workers' compensation insurance was also budgeted at 1.25% of total wages. In addition to evaluating compensation levels, Vanguard Collegiate will review employer benefits to ensure it is competitive with other schools. It has also budgeted a recurring line item of professional development of \$300 per FTE, increasing by 1.75% year over year.

**Technology Costs and Facilities Expenses.** Instructional supplies and resources have been adequately budgeted, growing by 3.00% year over year when appropriate. The driver for planned spending each year was tied either to the number of projected students or the number of projected new students being added in each year. In the first year, spending in this section of the budget averages around \$667/student, but then decreases to an average of about \$614 average per student each year, consistent with a school achieving economies of scale as it grows.

Vanguard Collegiate budgeted for administrative costs including for staff computers (\$850/staff member), as well as office materials, supplies, copier leases, and copy supplies.

Professional services and contracted services have been developed using other schools' budgets and vendor quotes. Vanguard Collegiate has ensured the budget has the requisite amounts set aside for insurance, back-office services, technology consulting, student information, food services, and nursing. In the case of back-office fees, this has been ascertained through actual quotes for services. Over the five years, this part of the budget averages approximately \$1.6K per year, starting around \$2.2K in Year 1 and reaching \$1.5K in Year 5, suggesting increased economies of scale as the school reaches full size.

Vanguard Collegiate is in the process of identifying a final facility. For the purposes of the budget and without a set option, a \$9.00 per square foot assumption has been budgeted for a space that is otherwise move in ready, increasing by 3% year over year; this is based on work with IFF and the preliminary range of \$8 to \$10 per square foot. Janitorial services have also been budgeted at \$1.50/square foot and utilities have been budgeted at \$1.50/square foot, with a separate budget set aside to furnish classrooms and office spaces.

Vanguard Collegiate has also included in its budget each year a 3% administrative fee assessed on its basic funding. In Years 2 through 4, Vanguard Collegiate also funds a dissolution reserve of \$10,000 each year to reach \$30,000 by Year 4.

**Variable Income.** Committed to conservative budget planning, Vanguard Collegiate did not incorporate any revenues otherwise variable or unsecured. All state and federal revenues are reasonable to include in the budget because they are revenue streams driven by formula or standard allocation. Vanguard Collegiate

did include an assumption for \$325,000 from the Walton Family Foundation to fund startup activity and provide additional support for the school's budget going into its first year of operations. It also included a \$75,000 assumption for board fundraising. A letter of commitment from both the board and the Walton Family Foundation can be found below.

**Contingency Plan.** Vanguard Collegiate has budgeted an ample projected fund balances to absorb the impact of potential revenue shortfalls. Fund balance is projected to be 8% after Year 1, or the equivalent of 1 month of operating cash on hand. By Year 5, fund balance is projected to reach just under 16% or 2 months of cash on hand. If Vanguard Collegiate encounters some financial difficulties in the form of a budget shortfall, such as higher facility costs, higher staffing expenses, or lower enrollment, it will use several strategies to make up the shortfall, including but not limited to:

- Staffing plan revisions: Administrative and leadership staff may have to be deferred or eliminated entirely. Instructional staffing may need to be revisited and optimized.
- Salary reduction: Salaries would need to be within the means of the organization, which might make the school less competitive in hiring.
- Benefits reduction: The school would have to revisit employer contributions to employee benefits and look for opportunities to achieve savings.
- Scale back facility requirements: The school might have to re-evaluate its intended square footage footprint to lower its lease and utility costs.
- Group purchasing: Identify opportunities to partner up with other local schools to share costs or participate in national charter school purchasing collaboratives.

In addition to reducing internal spending, Vanguard Collegiate will explore supplemental revenue opportunities like outside grants and fundraising. As mentioned earlier, it has only included \$75,000 in board fundraising in Year 1. It would evaluate a longer sustained fundraising effort by the board.

As a thought exercise, if Vanguard Collegiate were to miss its enrollment target in Year 1 by 15% or 18 students, that would result in a \$168K decline in revenues. With 15% less enrollment, Vanguard Collegiate would be able to eliminate two teaching positions, all the while still maintaining a low student to teacher ratio, plus drive down its variable expense base tied to number of students and save \$110K. With the projected fund operating income of \$71K in year 1, reducing revenues by \$168K and spending by \$110K would still allow Vanguard to have a positive operating income. This strategy is also possible in every year.

**Sufficient Funds Assurances.** The startup budget calls for \$299K in spending with the focus on getting the school's systems and processes up and running, as well as recruiting students and staff. It is only possible through the financial support of Walton Family Foundation, which Vanguard Collegiate currently has no concerns about receiving. A letter stating commitment of these funds can be found in this attachment. The recurring budget does include spending for special education students, and Vanguard Collegiate acknowledges that it may need to earmark more funding for additional students' needs. With the ample fund balance reserve over time, and an otherwise conservatively developed budget, Vanguard Collegiate is confident it will be able to re-designate funding and resources toward serving special education students adequately. The budget already includes an assumption for 3% towards a 403b plan – it is not currently planning to participate in the state retirement system. Finally, it has not included any transportation spending, as that is provided through Indianapolis Public Schools.



September 2, 2017

Indiana Charter School Board  
143 West Market Street, Suite 400  
Indianapolis, IN 46204

Re: Commitment of Start-Up Funds to Vanguard Collegiate of Indianapolis

To Whom It May Concern:

We are pleased to inform you that the Walton Family Foundation, in partnership with Building Excellent Schools and the Building Excellent Schools Fellowship, will make available \$325,000 of start-up funds for the start-up year (fiscal year 2017-2018) of Vanguard Collegiate of Indianapolis Charter School upon charter authorization. These funds will be characterized as a \$325,000 grant.

The grant is given in support of the start-up needs of Vanguard Collegiate of Indianapolis and will be contingent upon authorization of Vanguard Collegiate of Indianapolis.

Sincerely,

A handwritten signature in black ink that reads "Linda Brown".

Linda Brown  
Chief Executive Officer



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

September 1, 2017

Members of the Indiana Charter School Board  
143 West Market Street  
Suite 400  
Indianapolis, IN 46204

Dear Members of the Indiana Charter School Board,

This letter serves the purpose of articulating our financial commitment to Vanguard Collegiate of Indianapolis for the planning year and first five years of school operation should the charter application be approved.

Every board member is committed to making an annual contribution to the school, and collectively we commit to donate or raise \$75,000 annually.

We deeply believe in the mission and vision of Vanguard Collegiate and are enthusiastic to join in the efforts to provide quality educational opportunities to children in Indianapolis. The Founding Board of Directors hereby memorializes our commitment to donate and raise a total of \$75,000 towards the 2018-2019 school year. We will renew our commitment annually as part of Vanguard Collegiate of Indianapolis' annual development plan.

Sincerely,

Asia Bartee

Molly Chamberlin

Sibeko Jywanza

Daniel Levine

Dan Levine

Juan Pablo Román-Lagunas

Mark Johnson

Damon Martin

Damon Martin



VANGUARD COLLEGIATE  
OF INDIANAPOLIS

**Attachment 17**  
**Existing Non-Profit Entity**  
**Financials**

**(NOT APPLICABLE)**