

Proposal Overview and Enrollment Projections

**PROPOSAL OVERVIEW AND ENROLLMENT PROJECTIONS**

Please provide information for the applicant group's **designated representative**. This individual will serve as the contact for all communications, interviews, and notices from Education One regarding the submitted application.

**Legal name of group applying for charter(s):** Career Academy of South Bend, Inc.

**Names, roles, and current employment for all persons on applicant team:** Lawrence H. Garatoni, President

Paul Schlottman, Superintendent

Dean Fecher, Principal

Charles Loeser, Assistant Secretary

Chad Addie, Director of Development

**Designated applicant representative:** Charles Loeser

**Address:** 4100 Edison Lakes Parkway, Suite 260

Mishawaka, IN 46545

**Office and cell phone numbers:** Office 574-271-5145 x 218, cell 574-286-1283

**Email address:** Charles.Loeser@hqinvestments.com

Provide the requested information for each school included in this proposal.

Proposed School Name	Opening Year	School Model (e.g., college prep, dropout recovery)	Geographic Community *	School District(s) in Proposed Location	Grade Levels at Full Enrollment
Success Academy	2015-16	Elementary	3408 Ardmore Tr., South Bend	South Bend Community School Corp.	600

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

**Proposed Grade Levels and Student Enrollment**

Provide the following information for each charter school included in this proposal. Specify the planned year of opening for each, the grade levels served, and both the planned and maximum number of enrolled students by grade level for each year. (You may duplicate the table as needed.)

<b>Proposed School Name:</b>	Success Academy	
<b>Academic Year</b>	<b>Grade Levels</b>	<b>Student Enrollment (Planned/Maximum)</b>
Year 1 (starting 2015-16)	K-4	345 projected, 500 maximum
Year 2	K-4	500/500
Year 3	K-4	500/500
Year 4	K-4	500/500
Year 5	K-4	500/500
At Capacity	K-4	500/500

Do any of the proposed schools expect to contract or partner with an Education Service Provider (ESP) or other organization for school management/operation?\* Yes  No

If yes, identify the ESP or other partner organization:

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

Yes  No

If yes, identify the authorizer(s):

\_\_\_\_\_

Planned submission date(s):

\_\_\_\_\_

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

Authorizer(s):

None

\_\_\_\_\_

Submission date(s):

\_\_\_\_\_

## PROPOSAL NARRATIVE

Please respond to the following questions, limiting your narrative response to all proposal sections to 55 pages total, excluding attachments. \*Applicants completing the optional section on innovation (Section IV) may use an additional five pages (in which case the proposal narrative must not exceed 60 pages total).

## EXECUTIVE SUMMARY

The Executive Summary should provide a concise overview of the targeted community(ies) and your community engagement to date; the school design being proposed for replication; the replication or network growth plan; and the applicant's performance record and organizational capacity to execute the plan successfully. In **five (5) pages or less**, provide an Executive Summary that includes the following elements:

**Mission and Vision for Growth in Indiana.** State the mission and vision of the proposed schools and network as a whole. Provide an overview of the organization's strategic vision and five-year growth plan for developing schools in Indiana, including: years of opening; number and types of schools (grade levels); and projected number of students. Identify and briefly describe the targeted community(ies).

The proposed school ("Success Academy of South Bend" – "SASB") will be operated as part of a network including the applicant's existing Career Academy of South Bend ("CASB"), which currently offers grades 5-12 and is to be divided into a middle school (grades 5-8) and high school (grades 9-12). The network ("Career Academy Network" – "CAN") has detailed the mission and vision of the Career Academy in its change-of-authorizer application submitted February 26, 2015 (the "Prior Application"). With the current proposal to add a primary (K-4) school, the proposed SASB, the applicant believes that children in the greater South Bend area can be better served, and the mission of the existing Career Academy can be more successful, by offering the opportunity for strong preparation at the elementary school level. As stated in the Prior Application, students arriving at the Career Academy typically are at reading and math proficiency levels two or three years behind national norms for their grade level, reflecting conditions in the South Bend Community School Corporation schools.<sup>1</sup> Students who need remedial services to meet Indiana Core-40 graduation requirements do not have the scheduling freedom and flexibility to take CASB's innovative electives (e.g., welding, MicroSoft IT courses) or take internship positions offered by the Career Academy. A strong elementary-school preparation will benefit younger students wherever they go, and for those who go to the Career Academy, will position them to benefit from CASB's career-oriented program.

It is not anticipated at this point that the Career Academy Network will be expanded to include additional schools other than SASB.

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<sup>1</sup> In 2010, SBCSC ranked 288 of the 292 Indiana school systems in the percentage of students passing the English and math ISTEP tests: only Hammond, Gary, Indianapolis and East Chicago were lower. Indianapolis Star, 7/12/2011, [http://www.indystar.com/article/20110713/NEWS04/107130324/ISTEP-Improvement-not-much?odyssey=mod\\_sectionstories](http://www.indystar.com/article/20110713/NEWS04/107130324/ISTEP-Improvement-not-much?odyssey=mod_sectionstories).

**Educational Need.** Describe the educational needs and challenges of each community targeted and your rationale for choosing the community.

While there are a number of high-performing primary and intermediate<sup>2</sup> schools in the South Bend Community School Corporation, many SBCSC schools (ten of 18 primary schools and five of nine intermediate centers) have experienced difficulty as reflected by current “accountability” scores of “D” or “F” (see Appendix 1, following page). The relatively high-poverty neighborhoods on the west side of South Bend, where SASB will be located, have the greatest difficulty. Part of the rationale for the Career Academy’s decision to operate in South Bend was that the school’s founders, Larry Garatoni and Steve Hartz, were life-long residents of South Bend/Mishawaka and wanted to help their community. Within St. Joseph County, it is widely felt that the greatest area of need is on South Bend’s west side.

**Target Population.** Explain how the decision to serve the targeted population, including the grade levels you have chosen, would meet community needs.

This question is answered above.

**Community Engagement.** Explain the relationships, if any, that you have already established to engage students, parents, and the community for the proposed schools. If you have assessed demand and/or solicited support for the school, briefly describe these activities and the status of your efforts.

A summary of existing CAN relationships with community organizations and plans for ties with the new school is attached as Appendix 2.

**Education Plan/School Design.** Provide an overview of the education program proposed for replication, including key innovations and non-negotiable elements of the school model. Briefly explain the evidence base that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

As described in the Prior Application, CAN’s educational program utilizes project-based learning,<sup>3</sup> which is more engaging and successful for students turned off by traditional academic/abstract teaching.<sup>4</sup>

**Network Governance and Leadership.** Provide an overview of the proposed network governance, management structure and leadership team. Highlight the strengths of the proposed governing board and leadership team. Explain how the governance and management structure will provide for stable, effective governance and leadership for the proposed school replication plan over the long term.

SASB will be governed by the same board that governs the Career Academy and will be supervised by CASB’s superintendent, Paul Schlottman. The principal of SASB will be Dean Fecher, whose record of success in the Mishawaka school system is described below.

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<sup>2</sup> SBCSC operates 18 primary (K-4) schools and nine intermediate (grade 5-8) schools. In this application, “primary” refers to a K-4 school and “elementary” to a K-6 school.

<sup>3</sup> See *Pathways To Prosperity: Meeting The Challenge Of Preparing Young Americans For the 21st Century*, Pathways To Prosperity Project, Harvard Graduate School of Education, February 2011, available online at [http://www.gse.harvard.edu/sites/default/files/documents/Pathways\\_to\\_Prosperty\\_Feb2011-1.pdf](http://www.gse.harvard.edu/sites/default/files/documents/Pathways_to_Prosperty_Feb2011-1.pdf).

<sup>4</sup> See *Pathways*, p. 27, describing Project Lead The Way, a project-based educational approach used by the Career Academy (described at <http://www.pltw.org/>).

Appendix 1: South Bend Community Schools Accountability Data (per IDOE Compass website)

<b>High Schools (9-12)</b>	2009-10	2010-11	2011-12	2012-13	2013-14
Adams	Probation F	C	C	C	C
Clay	Probation F	C	C	C	C
Riley	Probation F	C	C	C	C
Washington	Probation F	D	D	D	D
Rise-Up	Not available				
<b>Intermediate Centers (5-8)</b>					
Brown	Progress C	Progress C	D	C	F
Dickinson	Probation F	Probation F	A	B	D
Edison	Progress C	Progress C	C	D	D
Greene	Progress C	Probation F	D	F	C
Jackson	Progress C	Progress C	F	B	C
Jefferson	Watch D	Progress D	B	C	A
LaSalle	Exemplary A	A	A	A	A
Marshall	Progress C	D	D	F	D
Navarre	Progress C	Probation F	D	F	F
<b>Primary Centers (K-4)</b>					
Coquillard	Progress C	C	C	D	D
Darden	Progress C	C	D	A	A
Hamilton	Commendable B	A	A	A	A
Harrison	Probation F	Progress C	F	D	F
Hay	Progress	C	D	C	D
Kennedy	Exemplary A	A	A	A	A
Lincoln	Progress C	C	D	C	C
Madison	Probation F	Progress C	F	F	F
Marquette	Progress C	C	C	D	D
McKinley	Progress C	C	C	D	C
Monroe	Progress C	Progress C	F	D	F
Muessel	Progress C	F	F	C	D
Nuner	Progress C	D	D	F	D
Perley	Progress C	A	F	D	D
Swanson	Watch D	C	D	A	C
Tarkington	Commendable B	A	A	A	A
Warren	Progress C	C	F	A	C
Wilson	Progress C	C	D	B	F

Exemplary Progress = A  
 Commendable Progress = B  
 Academic Progress = C  
 Academic Watch = D  
 Probation = F

## Appendix 2: Community Engagement

Two staff CAN positions (Director of Development Chad Addie and Community Outreach Coordinator Susan Waltherhouse) focus on community engagement. Current and emerging community partnerships include:

1. Michiana Boys & Girls Clubs- CAN is working with MBGC to provide before and after school services at SASB.
2. LaSalle Square Library Branch- One of the libraries of the St. Joseph Public Library system is adjacent to SASB. CAN & the library branch management have met to lay out initial plans for partnering year round (during school year & summer programming).
3. Five Star Life- This regional youth character development organization features staff development for schools, school-wide character curriculum, and after-school programming for grades 6-8. Seth Maust, co-founder, met with Chad Addie to establish CAN as a pilot school for new and existing programs in the South Bend area. See [www.fivestarlife.org](http://www.fivestarlife.org).
4. Church Network Support- CAN hosts Challenge Day (<http://www.challengeday.org/>) events and similar mentoring opportunities that has opened a strong network of supporters through the faith community.
5. S.O.S. Network- Summer of Service is a local youth organization comprised of close to 50 youth ministries that partner to train youth and support community service projects throughout Michiana. Founder Mark Gardner, a middle school math teacher at Career Academy, indicates that approximately 700 area youths, including 40 from CAN, will participate. A new location to be centered on the LaSalle Square area (adjacent to SASB) has been added to the 2015 campaign. The surrounding community will enjoy food giveaways, free car washes, and a neighborhood kids' event, <http://summerofservice.net/>.
6. LWW Community Clean Up- Founder Consuella Hopkins leads teams of community members in community clean up events on South Bend's "west side corridor" - see [https://www.youtube.com/watch?feature=player\\_detailpage&v=pfGr\\_CHQ3Ek](https://www.youtube.com/watch?feature=player_detailpage&v=pfGr_CHQ3Ek). CAN is a proud community partner; CAN students will join in this year's clean up.
7. La Casa De Amistad- The primary support organization for the Latino community, La Casa de Amistad, and leader Sam Centellas is partnering with CAN to provide increasing positive educational options for Latino students in both primary and secondary school contexts. See <http://www.lacasadeamistad.org/>
8. Camp Ray Bird- South Bend has a long-standing relationship with this west side summer camp that specifically offers summer experiential learning for students from throughout Michiana. CAN partners with and utilizes facilities during the school year for team building and individual experiential learning. Key contact for CRB is Director David Mui, see <http://www.raybird.org/>.
9. Beacon Resource Center- The former Beacon Bowl is being rejuvenated into a community center with the mission to transform South Bend's west side. Founder Keith Walatka is a supporter and ally in the emerging neighborhood mission of educational and community change as shared by CAN. The Beacon Resource Center is located near the new Success Academy and is partnered in multiple programmatic efforts relative to CAN students, see <http://thebeacon.cc/about/the-story/>.

10. Michiana Youth Ministries- The MYM team has been supportive of mentoring opportunities with CAN and plans to continue. Founder Terry McBride and CAN plan to expand partnership as MYM will use CAN facilities to host weekend events beginning in the Fall of 2016. MYM represent hundreds of civic-minded 9<sup>th</sup> – 12<sup>th</sup> grade students in Michiana. See <http://michianayouth.org/>.
11. Goodwill Industries- A warm organizational relationship has been forged with local Goodwill programs. Specifically, utilizing shared space or programmatic partnering is being explored as Goodwill opens its “second chance high school” option in South Bend, known as the Excel Center (targeting students 18 and older looking to complete a high school diploma and receive specific career-oriented certifications). <http://excelatgoodwill.org/>
12. Unity Gardens- Located adjacent to the new Success Academy, the Unity Gardens is a collaborative network of community gardens originated to increase the availability, awareness, and accessibility of healthy, locally grown food through community-inclusive partnerships. SASB students will participate. <http://www.theunitygardens.org/>
13. Beacon Health Systems/South Bend Memorial Regional Hospital- CAN has been meeting with Memorial to establish more advanced certifications and support programs for students preparing to engage in community health careers. A representative from Memorial Hospital serves on the CAN Board.
14. HealthWorks! Kids Museum- Director Rebecca Zackowski and CAN have been pursuing specific plans for integrating CAN students with HealthWorks! Kids Museum outreach and programming. See <http://www.healthworkskids.org/healthworks/splash.cfm>.
15. American Red Cross- Student-initiated blood drives and health fairs are components of Career Academy’s biomedical learning community. A large, community-wide health fair & blood drive is planned for Thursday, May 28<sup>th</sup>.
16. Project Lead The Way/CPEG Initiative- CAN has been supportive and instrumental in the initiation of a pilot program for the national PLTW organization to provide STEM resourced education to schools in the St. Joseph area seeking to add advanced STEM education, see <http://www.insideindianabusiness.com/newsitem.asp?ID=63953>. [CPEG, the Corporate Partnership for Economic Growth, <http://www.cpeg.org/>, is a coalition of regional business leaders who seek to develop and leverage regional assets that spur long-term economic growth and prosperity of Northern Indiana.]
17. Indiana Fallen Heroes- CAN is the supporting organization behind an initiative to honor the 200 plus soldiers who have fallen in combat since the USS Cole attack. Large placards with pictures and bios are used in community events to honor and promote awareness of veterans who have recently paid the ultimate sacrifice.

**SECTION I: EVIDENCE OF CAPACITY**

**Founding Group**

**Founding Group Membership**

1. Identify the key members of the Founding Group for the proposed school(s). Identify *only* individuals who will play a substantial ongoing role in school development, governance and/or management, and will share responsibility for any school or for the network as a whole. These may include network leadership, proposed governing board members, school leadership/management, and any essential partners who will play an important ongoing role in the school or network development or operations.

The current members of the board of directors of Career Academy of South Bend, Inc., are:

Lawrence Garatoni President/Treasurer Finance Committee	Retired businessman/philanthropist. <sup>5</sup> Expertise in business, finance, and management.
Tracy Graham Finance Committee	Founder of multiple successful software businesses. Notre Dame graduate, active in many non-profit organizations. Served on transition team for South Bend mayor Pete Buttigieg. <sup>6</sup>
Vivian Sallie Secretary	Expertise in governance of non-profit organizations, marketing and community relations.
Jinny Longbrake	H.R. Director of Beacon Health System. Expertise in health careers. Serves as Chair of the Indiana Workforce Board Association and Northern Indiana Workforce Board. <sup>7</sup>
Larry Davis	President/Owner of Daman Products <a href="http://www.daman.com/">http://www.daman.com/</a> Expertise in advanced manufacturing, extensive experience in support of educational organizations. Indiana's Small Business Person of the Year 2005. Recipient of the South Bend Alumni Association's 2011 Corporate Contribution to Education Award
Suzanne Wiwi	Principal of St. Joseph Grade School, South Bend, which was named a 2011 National Blue Ribbon School <sup>8</sup> by the U.S. Department of Education. Expertise in education.
Thomas Coley, Ph.D.	Chancellor of Ivy Tech Community College, Northwest and North Central Regions. Expertise in education.

A key participant in development of the Success Academy elementary school will be Paul Schlottman, who as Superintendent will oversee the elementary school as well as the middle school and high school.

<sup>5</sup> See <http://www.uwsjc.org/news-and-events/e-news/388-philanthropist-of-the-year-winners-judy-a-larry-garatoni.html>.

<sup>6</sup> See <http://www.freshstartsouthbend.com/transition-team/tracy-graham>.

<sup>7</sup> See <http://www.gotoworkone.com/home/index.asp?page=135> – responsible for the training, educational attainment, workplace readiness, and soft skills of Northern Indiana's workforce.

<sup>8</sup> See <http://www2.ed.gov/programs/nclbbrs/index.html>.



Explain the Founding Group's collective qualifications for establishing high-quality schools in Indiana and assuming stewardship of public funds, including your capacities in areas such as:

- School leadership, administration and governance
- Curriculum, instruction and assessment
- Financial, business and school operations management
- Performance management
- Parent and community engagement
- Facilities management

Mr. Garatoni, Mr. Graham, and Mr. Davis have been successful entrepreneurs. Much of Mr. Garatoni's business career involved real estate and construction; he worked extensively with architects from Panzica Building Group on the Career Academy's award-winning design<sup>9</sup> which will be replicated for SASB. Ms. Wiwi, Dr. Coley and Mr. Schlottman are experienced and successful educational leaders. Ms. Longbrake has expertise in career training. Ms. Sallie is an expert in marketing and has extensive experience with both organizations and markets in greater South Bend. The school where Mr. Schlottman served as principal before coming to CASB improved academically during his tenure.<sup>10</sup>

Provide, as **Attachment 1**, full resumes (including contact information) for the individuals named. Identify members of the Founding Group who are proposed as board members, school leaders, or other key staff members of the first school proposed in this application. **NOTE: There is no page limit for this attachment.**

Resumes are attached.

2. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school(s) proposed, along with a brief description of their current and planned role and any resources they have contributed or plan to contribute to school development.

As indicated above and at note 9, CAN is utilizing the same architectural and construction management firm, Panzica Building Corporation for SASB as for CASB.

3. Explain the circumstances and motivations that brought the Founding Group together to propose this school replication plan.

The Founding Group first came together in 2010 when Larry Garatoni and Steve Hartz joined to create Career Academy of South Bend, Inc., to operate CASB. After the high school had operated for several years, CASB's board was advised by Mr. Schlottman, who became CASB's principal in January of 2014, that the mission of CASB would be better served if students were academically stronger before reaching high school. This led initially to CASB's decision to expand to include grade 5 and grade 6 as of the beginning of the 2014-15 school year, but Mr. Schlottman advised and the board agreed that a strong foundation is best achieved by beginning as early as possible, i.e., by offering a full K-12 program. Many parents of CASB students had expressed a strong desire that a similar school be available for their younger children. When the site was found, the board decided to proceed immediately.

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<sup>9</sup> CASB's design was recognized in 2012 by the American Society of Interior Designers with a Design Excellence Award for "Best Educational Facility" ("Career Academy South Bend Recognized for Architecture Innovation" – see <http://www.panzica.net/career-academy-south-bend-recognized-for-architecture-innovation/>).

<sup>10</sup> As shown by the IDOE Compass website, the percentage of students passing both the math and English ISTEP tests at Boone Grove Middle School increased from 67.7% in Mr. Schlottman's first year (2006-2007) to 79.5% in his last year (2012-13).

### School Leader and Leadership Team

1. For the first proposed school described in this application, identify the Principal/Head of School candidate and explain why this individual is well-qualified to lead the school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates the leader's capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that he/she has completed or is currently participating in. Also provide, as **Attachment 2**, the qualifications and resume for this individual. If no candidate is yet identified, explain your timeline, criteria, and process for recruiting and hiring the school leader. **NOTE: There is no page limit for this attachment.**

The principal of SASB will be Dean Fecher, an experienced and respected principal in the School City of Mishawaka (SCM) system.

When Mr. Fecher started his administrative career at Liberty Elementary in the winter of 2009, he entered a building midyear that was in its second year of probation for not meeting AYP. In the 2008-2009 school year, Liberty School had a poverty rate (students qualifying for free or reduced lunch) of 63.8%. By end of the 2009 -2010 school year (1 ½ years later), Liberty was an Indiana Four Star School - the only Indiana Four Star School with a free and reduced percentage greater than 65%. As reported at IDOE-COMPASS, the percentage of students at Liberty passing both the math and English ISTEP tests went from 67.1% before Mr. Fecher's arrival to 86.1% in 2012-13, while the percentage of students qualifying for free and reduced lunch increased from 63.8% to 72.1% (with enrollment increasing from 398 in 2010-11 to 473 in 2012-13).

When Mr. Fecher took over as principal of Beiger Elementary in 2012/2013, the school had received a "C" rating. Under Dean's leadership, Beiger improved to a "B" school in 2012-13 and 2013-14. The following year Beiger Elementary was honored as 2014-2016 National PTA School of Excellence, one of two schools in the state of Indiana to receive this distinction.<sup>11</sup> As reported by IDOE-COMPASS, the percentage of students passing both the math and English ISTEP tests at Beiger Elementary increased from 65.9% before his arrival to 75.8% in 2012-13, while the percentage of students qualifying for free and reduced lunch increased from 62.6% to 71% and enrollment increased from 465 to 549.

In addition to his proven success as a school principal working with high-poverty students in the South Bend/Mishawaka area, Mr. Fecher was a teacher and coach in Mishawaka beginning in 1992, as detailed in his resume (Attachment 2).

2. Who will work on a full-time or nearly full-time basis immediately after approval to lead development of the school? How will this person be compensated?

Mr. Schlottman and Mr. Fecher will lead the development of the school. Mr. Schlottman is a salaried employee of CASB. Mr. Fecher is working part-time (on a stipend basis) for CAN while continuing as principal at Beiger until the end of the 2014-15 school year (6/30/2015). He will become a full-time employee of CAN as of 7/1/2015.

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<sup>11</sup> See [http://www.pta.org/files/statereflectionslibrary/SOE/2014-2016%20National%20PTA%20Schools%20of%20Excellence%20List%20for%20web\\_1409857959904\\_2.pdf](http://www.pta.org/files/statereflectionslibrary/SOE/2014-2016%20National%20PTA%20Schools%20of%20Excellence%20List%20for%20web_1409857959904_2.pdf)

3. Describe the responsibilities and qualifications of the first proposed school's administrative/management team (beyond the school leader). If known, identify the individuals who will fill these positions and provide, as **Attachment 3**, the qualifications and resumes for these individuals. If these positions are not yet filled, explain your timeline, criteria, and process for recruitment and hiring. **NOTE: There is no page limit for this attachment.**

In addition to Mr. Schlottman and Mr. Fecher, the administrative team for SASB will include:

- Michael Poynter, Athletic Director
  - Chad Addie, Director of Development (shared with CASB)
  - Rachell Davis, Special Education Director (shared with CASB)
  - Sarah Fine, Director of Student Service (shared with CASB)
  - Roger Johnson, IT Director (shared with CASB)
  - Tamara Collins, H.R. Director (shared with CASB)
  - Assistant Principal – Scott Braun.
  - Evan Henry, Facilities Manager (shared with CASB)
  - Sharon Roeske, Data Coordinator
- See resumes at Attachment 3.

## Governance

### Legal Status and Governing Documents

For the entity proposing to hold the charter(s), provide the following governance documents as **Attachment 4**:

- 501(c)(3) Letter of Determination from the Internal Revenue Service (or evidence that the applicant has applied for federal tax-exempt status from the IRS);
  - Copy of the Articles of Incorporation; and
  - Copy of Board Bylaws.
- NOTE: Applies only to non-profit corporations based outside of Indiana:** Evidence that the proposed charter holder is registered to do business in Indiana.

See Attachment 4.

As **Attachment 5**, provide one (1) complete and signed Statement of Assurances form.

See Attachment 5.

### Governing Board

1. **Governance Structure and Composition.** Describe the governance structure. Will the new school(s) have an independent governing board, or will there be a single network-level board governing multiple schools? Describe the current and desired size and composition of the governing board. In addition, list the name of each current board member within the proposal narrative. In **Attachment 6**, provide a completed and signed Board Member Information Sheet for each current Board member for the governing entity/charter holder. **NOTE: Please use the provided form included in this RFP. If a Board member's resume has already been included in Attachment 1, a duplicate resume should NOT be included in Attachment 6.**

SASB will be governed by the same board as CASB, as described above. The board currently has seven members but the corporation's articles allow a larger or smaller board and the founders are considering increasing the size of the board. See Attachment 6 for the Board Member Information Sheet signed by each board member.

2. **Pre-Existing Nonprofit Organization.** If this application is being submitted by an existing nonprofit organization or institution *other than* a charter school governing board, describe what steps the existing board

will take to transform its board membership, mission and bylaws to support the charter school expansion/replication, and to comply with Indiana's Public Access Laws, including the Open Door Law.

Not applicable.

3. **Governing Entity's Responsibilities.** Explain how the proposed governance structure and composition will help ensure that there will be active and effective oversight of all Indiana charter schools in the network's portfolio.

The board will continue to meet on a near-monthly basis. Mr. Fecher will report to Mr. Schlottman; both will attend board meetings and keep the board informed of school operations. With a small network of three schools comprising a K-12 system, the board will have sufficient time to be receive the necessary information for making policy decisions.

4. **Procedures.** How many times has the current board met to date? What will be the planned frequency and focus of meetings? Identify any standing subcommittees the board expects to have. Describe how the school and governing board will comply with Indiana's Public Access Laws as described within IC § 5-14. Additional guidance is available from the Office of the Public Access Counselor at <http://www.in.gov/pac/> and at (317) 234-0906 or (800) 228-6013.

The board has met on a monthly basis, with some exceptions when no action was required, since first convening in February, 2011. The board has previously operated with an executive committee, finance committee, and marketing committee. The board will continue to comply with Indiana's public access laws by notifying any requesting news organization (to-date, the South Bend Tribune) in advance of meetings, posting notice of meetings on the entrance to the school, holding meetings in public, and making copies of minutes and other non-privileged documents available upon request.

5. **Ethics and Conflicts of Interest.** Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as Attachment 7, the board's Code of Ethics and Conflict of Interest policy. **NOTE: There is no page limit for this attachment.**

The board's conflicts of interest policy is stated in Article V of its bylaws (included in Attachment 4) and is attached as Attachment 7.

6. **Advisory Bodies.** Describe any network- or school-level advisory bodies or councils to be formed, including the roles and duties of that body. Describe the planned composition of the advisory body and the reporting structure as it relates to the governing board and school leadership.

No advisory bodies or councils will be formed.

7. **Grievance Process.** Explain the process that schools will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure or practice at the school. Describe the types of corporate or school documents that will be available to parents free of charge and how those will be made available.

A parent or student who is dissatisfied with an action by a teacher may appeal to the principal, and if dissatisfied with the decision of the principal, may appeal to the superintendent. While board meetings are public and anyone has the right to attend, CAN has not established a policy of allowing appeal to the board if dissatisfied with a decision of the superintendent, or a right to debate with the board about a board decision. Copies of board meeting minutes will be available to parents free of charge via the school's website.

**IMPORTANT NOTE:** If a charter is awarded by Education One, L.L.C., each Board member of the governing body (i.e., the legal entity that has been awarded the charter) is required to undergo an expanded background check prior to execution of the charter agreement.

## School Management Contracts

If the applicant does not intend to contract with an Education Service Provider (ESP), mark "Not Applicable" and skip to next section.

Not applicable. No Attachment 8.

## Network Vision, Growth Plan & Capacity

Provide the following information about the organization's growth plan and capacity to carry out that plan with quality and integrity.

1. Provide, as Attachment 9, the organization's 5-year business plan addressing the plan for network expansion in Indiana (and in other states, if applicable). If no business plan has been developed, please answer the remaining questions in this section. **NOTE: Experienced CMOs and ESPs are required to submit business plans containing all components of a traditional business plan. There is no page limit for this attachment.**

CAN does not have a five-year expansion plan.

2. If not clearly described in Attachment 9, or if no business plan exists, describe the organization's strategic vision, desired impact, and five-year growth plan for developing new schools in Indiana and other states, if applicable. Include: number and types of schools; planned opening years; all currently targeted geographies and criteria for selecting them; projected numbers of students; and measurable impact on student achievement.

CAN does not have plans for additional schools other than SASB.

3. If not clearly described in Attachment 9, or if no business plan exists, summarize the organization's capacity to support and ensure the quality and long-term success of the new school(s) proposed. If the organization's existing portfolio or growth plan includes schools in other states, explain how Indiana fits into the larger growth plan and how the organization will support and ensure quality in the schools planned for Indiana.

CAN's capability for capital expenditures and any other necessary funding beyond state tuition support is from the support of the Garatoni-Smith Family Foundation. CAN's capacity to make SASB an excellent school is through the proven leadership of Mr. Fecher and Mr. Schlottman.

4. If not clearly described in Attachment 9, or if no business plan exists, provide evidence of organizational capacity to open and operate schools successfully in accordance with the growth plan. Explain results of past replication efforts and lessons learned, including how you have addressed replication challenges in other markets.

This question is inapplicable since CAN does not have a growth plan for multiple schools and this application is not based on replicating an existing school. The Prior Application describes CAN's experience with its prior school.

5. If not clearly described in Attachment 9, or if no business plan exists, describe the greatest anticipated risks and challenges to achieving the organization's desired outcomes in Indiana. How will the organization meet these challenges and mitigate risks?

The risk/challenge of attracting students will be addressed by a thorough marketing effort similar to what was done in 2014 leading to the substantial growth in CASB's enrollment as of the beginning of the 2014-15 school year. As there are already almost 200 students signed up for SASB before the beginning of the media marketing campaign and the summer season when most moves are made, the marketing risk is considered manageable. The risk/challenge of achieving academic progress will be addressed by Mr. Fecher, who has demonstrated the ability to lead students to academic progress in the two schools where he previously served as principal.

## Network Management

1. Explain any shared or centralized support services the network organization (including any ESP partner) will provide. Describe the structure, the services to be provided, the cost of those services, how costs will be allocated, and specific service goals. How does the organization know whether it is successfully delivering these services? *(In the case of a governing board proposing to contract with a management organization, service goals should be outlined in the term sheet and draft contract to be provided with the charter application.)*

CAN will provide SASB with administrative services including Human Resources management (including a 401k plan, available to all full-time employees including licensed personnel enrolled in the Indiana Teacher Retirement Fund), Special Education administration, marketing, budgeting/bookkeeping/accounts payable management, community outreach, and legal representation.

Costs for salaried personnel (such as H.R. Director and Special Education Director) will be allocated between CASB (high school and middle school) and SASB. There is no charge for legal representation (provided free of charge through Mr. Garatoni).

Service goals will be measured by personnel evaluations of the individuals responsible for each service, relying on visible metrics, e.g., enrollment levels as a measure for marketing, donation levels as a measure for development, and completion of appropriate IEPs as a measure for Special Education Services.

The governing board will receive ongoing operations reports from the principals of each school including SASB. The principals of each school will meet on an ongoing basis with Mr. Schlottman, who as Superintendent is responsible for supervising all aspects of school management and working with the board and school principals to make policy decisions to guide school operations.

2. Using the table below, define school- and organization-level decision-making authority as it relates to key functions, including curriculum, culture, staffing, corrective actions, etc. Indicate where primary authority for each function resides.

Function	Network/ Management Organization Decision-Making	School Decision-Making
Performance Goals	Oversight	Primary authority
Curriculum	Oversight	Primary authority
Professional Development	Oversight	Primary authority
Data Management and Interim Student Assessments	Oversight	Primary authority

Function	Network/ Management Organization Decision-Making	School Decision-Making
Grade Level Promotion Criteria	Oversight	Primary authority
Culture	Oversight	Primary authority
Budgeting, Finance, and Accounting	Primary authority	
Student Recruitment	Primary authority	
School Staff Recruitment and Hiring	Oversight	Primary authority
HR Services (payroll, benefits, etc.)	Primary authority	
Development	Primary authority	
Community Relations	Oversight	Primary authority
Information Technology	Primary authority	
Facilities Management	Oversight	Primary authority
Vendor Management / Procurement	Primary authority	
Other operational functions, if any Legal compliance and contractual relationships	Primary authority	

3. Provide, as **Attachment 10**, the following organizational charts:
  - a. Network as a whole, aligned with the 5-Year Business Plan
  - b. School-level organizational chart for School 1 in Year 1, and also at Full Capacity

**NOTE: Limit attachment to five (5) pages.**

The network and school-level organizational charts should clearly delineate the roles and responsibilities of the governing board, staff, and any Education Service Providers that will manage the school(s).  
See Attachment 10.

## SECTION II: SCHOOL DESIGN

For this section, describe the design and plan for each school for which you are applying. If you are applying for multiple schools designed around the same model, simply state so.

### Education Plan

#### Curriculum and Instructional Design

1. Provide a framework for the proposed instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed Indiana's Academic Standards as described in IC § 20-31-3. Please also describe how the proposed instructional design will align with or exceed the Common Core Standards. More information about Indiana's adoption of the Common Core Standards and the implementation timeline can be found at <http://www.doe.in.gov/achievement/curriculum/resources-implementing-indianas-common-core-standards>.

Since Indiana no longer utilizes the Common Core Standards, SASB's instructional design will be based on the new Indiana standards, see <http://www.doe.in.gov/standards>.

The description of the instructional design should include, at a minimum, the following items:

- the basic learning environment (e.g., classroom-based, independent study, virtual)

#### **Instruction will be classroom-based**

- class size and structure,

#### **Classes will be small: limit of 20/class for K-2 and 23/class for grades 3-6**

- an overview of the curriculum,
- the use of technology in delivering instruction (if applicable),
- plans for ensuring the school is staffed with highly effective teachers, and
- evidence-based support.

The conceptual basis for SASB's instruction is described below. Success Academy will offer learners a quality primary education to prepare for a successful high school experience and the subsequent options of fulfilling employment and/or admission to an institution of higher education. This promise is made with the understanding that education is a shared responsibility of the public schools, the parents, the community and the individual learners. Success Academy values the energy, dedication and success of all schools while recognizing that a charter school offers an opportunity to use unconventional means not currently available in all public school settings, e.g., the Project Lead The Way "Launch" program for elementary schools, <https://www.pltw.org/our-programs/pltw-launch>.

The critical first step to academic progress is to develop the habits and attitudes conducive for learning. SASB believes that learning occurs when...

- learners construct meaning
- learners see connections between what they learn and the real world
- learners are actively engaged in purposeful tasks
- activities are integrated and meaningful



- learners work individually and as members of a group. Learners work side-by-side with community members to develop solutions and opinions to issues that can be presented to local policy makers
- learners are expected and encouraged to learn
- learners internalize that what they learn and do in school makes a positive change in the community
- learners are supported with coaches, mentors and advocates
- all learners have advanced learning opportunities
- all essential curriculum are determined by outcomes and the Indiana State standards, and are assessed through formative and summative performance activities

### **Rationale for SASB’s Program Design Elements**

***Small class size:*** Success Academy will maintain small class sizes (20/class for K-2 and 23/class for grades 3-4) as a way to ensure that learners get more individual attention. Research has shown this has a positive impact on educational outcomes.

***Small school to develop sense of community:*** According to the results from the National Longitudinal Study of Adolescent Health, students who attend small schools with small class sizes tend to feel better connected to their educators and one another and are less likely to engage in risky behavior such as drug use, violence or early sexual activity.

#### ***Parent/Family Participation:***

SASB believes that education is strengthened by a partnership of families, educators and administrators. Having value placed on education by the entire community strengthens the learner’s motivation to excel. The active participation of parents in the classroom allows for more individual attention and educational support. As a result of these beliefs, all Success Academy families are strongly encouraged to participate in volunteer activities for the school. Their participation is a crucial component for the success of the school.

### **Pedagogical Strategies**

The design of SASB’s curriculum is based on the theory that individuals learn best when they learn from their own personal experience. This is best described as the Constructivist Approach to learning. In addition, there is a belief that each individual’s approach to learning can be described by the concept of Multiple Intelligences, i.e. (linguistic, mathematical, intrapersonal, interpersonal, bodily-kinesthetic, spatial, naturalistic and musical). This suggests that individuals learn more easily when they have the opportunity to use the “Intelligence(s)” or learning approach(es) they prefer. Pedagogical strategies that are used at the school include: project based learning, integrated thematic curriculum units, authentic experience, inquiry-based instruction, integrated arts, personalized learning projects, enrichment sessions, and community service.

#### **Project based learning:**

Each thematic unit at the Success Academy ends with a final project created by either an individual or learner group. These projects are designed to provide the opportunity to apply

learning to complex problems as well as to develop products that utilize written and oral expression, technology, the arts, math, language arts, social science and science. It requires the learners to learn how to undertake extended research, analyze the information and synthesize the information into a presentation. It provides the learners an opportunity for self-directed in-depth learning and allows them the experience of being an educator through their presentations. Finally, it provides an opportunity for the learners to practice time management in accomplishing the multiple facets of the task. These same skills will be needed for success in high school, college, and the world beyond.

***Integrated Thematic curriculum units:*** To facilitate learning across subject areas, educators in core subject areas collaborate to integrate classes around the unifying thematic unit when designing classes. Educators will be provided one hour of collaboration during each school day with additional opportunities to collaborate both before and after the student school day.

***Integrated arts:*** Visual and performing arts are woven throughout the curriculum as a way to illuminate knowledge in the core subjects. Learners are provided a similar opportunity to incorporate the arts into their final projects.

***Authentic Experience:*** As the learners mature, the school provides them with “real world” opportunities to gain authentic experiences. One example of this is the learner’s participation in the school’s mandatory community service program described below.

***Inquiry-based instruction:*** Some learners learn best when they are posed with a series of questions. They then must work alone, in groups, or with an educator in working through the questions to find the answer. This process allows the student to approach the question using his/her preferred “intelligence(s)”. This approach also supports the school’s philosophy of not “teaching towards tests”. SASB would rather educate learners so they have the skills and knowledge base to solve their own problems when they become adults.

***Community Service:*** Community service is a vital and distinctive element of the Charter curriculum. The community service requirement is designed to instill a sense of individual responsibility, social responsibility and civic responsibility. It enables learners to use newly found knowledge to solve community problems. Students, together with SASB staff and based on interaction with community and government leaders, will determine specifics of the program.

***Enrichment:*** All students are given the opportunity to choose non-core curriculum courses called enrichment sessions. Enrichment sessions are taught by family and community volunteers. Enrichment topics include but are not limited to sewing, auto mechanics, community service, biking, cooking, electronics, robotics, computer graphics, science and visual and performing arts. These opportunities allow learners to expand the breadth of their education and perhaps identify a new passion to pursue.

## Curriculum

The curriculum of Success Academy is comprised of a variety of learning areas including language arts, science, environmental studies, social studies, mathematics, foreign language, health/physical education, and technology.

**Language Arts:** The language arts goals are to develop learners who are effective communicators, who love literature, and who are lifelong readers and writers. Comprehension skills, vocabulary and grammar are integrated within a literature program. Writing includes a personal journal and creative and expository writing. Communication areas of focus include speaking, writing and presentation skills using modern technological tools.

**Mathematics:** The mathematics curriculum at Success Academy strives to develop learners who are able to use their math skills effectively and efficiently in real life settings. Success Academy's math curriculum is driven by essential learnings that have been taken from the Indiana State Standards and the National Council of Teacher and Mathematics standards.

**Science:** Success Academy's science curriculum emphasizes hands-on experimentation and functional knowledge of scientific phenomena. While the specific disciplines are the same as presented in the Indiana State Science framework, the school curriculum differs in several areas. This approach involves experimentation, field trips and visits from guest scientists and local experts. Major concepts are re-emphasized as appropriate and relevant to the interrelationship of disciplines.

**Social Studies:** This curriculum develops learners who understand that history and social science are about real people, in real places, solving problems relevant to the learners' own lives. Students understand the interrelationships between the peoples of the world and study the past as a background and a prelude to the present.

**Foreign Language:** Study of a foreign language is an integral aspect of the Success Academy curriculum. All students will study Spanish for three thirty-minute sessions per week. The school will use local linguistic and cultural diversity to further the learners' development.

**Health and PE:** Success Academy will provide an atmosphere that encourages all learners to enjoy physical activity and to incorporate it into their everyday lives. This program emphasizes "lifetime" or "individual" activities as well as "cooperative" sports to perpetuate the concept of lifelong activity.

**Technology:** The Success Academy's technology program will include learning tools such as computers, interactive video equipment, audio-visual aids, scientific equipment and networks linked to local and nationwide resources. These tools help students guide their own education. They support a child's natural way of learning both through individual and group discovery as well as seeking solutions to real life challenges.

**Social Emotional Learning (SEL):** The SEL program at Success Academy is designed to teach to the whole child. The development of the whole child is accomplished by integrating social and emotional concepts into each of the curricular areas at Success Academy. Social Emotional Learning is regarded as a community responsibility, owned by educators, learners, parents and other community members at large. Research shows Social Emotional Learning is especially important for low-income students.<sup>12</sup>

### **Responsibility**

Responsibility is a fundamental focus of the entire community at the Success Academy. Areas of responsibility that receive attention include personal responsibility, personal mastery, personal integrity and self-esteem. Below are beliefs surrounding responsibility as shared by the community as a whole.

***Personal Responsibility:*** Students must learn to accept responsibility for how they act, express ourselves, and react, and to be accountable for the consequences.

***Personal Mastery:*** We strive for personal mastery, which we define as the process of continual improvement. We continually seek to surpass our previous personal best.

***Personal Integrity:*** As individuals we seek to understand ourselves, be clear about what we believe and live those beliefs. Our words, and most importantly, our actions are congruent with our beliefs. Children will do as we do, not as we say.

***Self-Esteem:*** Our self-image and vision of our future have a major impact on how we function throughout life. We seek to acknowledge individual achievements, validate personal goals, recognize each member's uniqueness and encourage interpersonal and intra-personal skill acquisition in order to foster development of self-esteem.

### **Time Management**

Success in extended projects in college and in a career is easier if one has the skill set of time management. This skill set assists the individual in planning so that projects can reach completion within the allotted time. The Success Academy staff will begin in the earlier grades to show learners how to manage their time by giving out homework at the beginning of the week. While the assignment includes a suggested plan of completion, the learner is encouraged to draft his/her own plan for completion as desired. This personal ownership combined with continued practice facilitates the learner's time management proficiency.

### **Ensuring the school is staffed with high-quality teachers.**

CAN offers attractive salaries as a crucial part of providing an extraordinary education for students. SASB will provide extensive professional development for all teaching staff and will reward staff members who are effective teachers and who by pursuing further education become more effective.

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<sup>12</sup> "5 reasons to invest in the social and emotional development of students" (Brookings Institute, 5/5/15), [http://www.brookings.edu/blogs/brookings-now/posts/2015/05/5-reasons-to-invest-in-the-social-and-emotional-development-of-students?utm\\_campaign=Brookings+Brief&utm\\_source=hs\\_email&utm\\_medium=email&utm\\_content=17527213&hsenc](http://www.brookings.edu/blogs/brookings-now/posts/2015/05/5-reasons-to-invest-in-the-social-and-emotional-development-of-students?utm_campaign=Brookings+Brief&utm_source=hs_email&utm_medium=email&utm_content=17527213&hsenc).

There are five components to CAN's compensation plan (attached as Appendix 3):

1. As all public schools are required to do under Indiana law, CASB will conduct annual performance evaluations to rate teachers within the four legally required categories: effective, highly effective, needs improvement, and ineffective. Indiana Code 20-28-11.5-4. CASB will rate teachers on a 4.0 scale, with 2.4 qualifying as effective and 3.5 qualifying as highly effective.
2. Under Indiana law, there can be no increase in compensation for teachers rated as ineffective or needing improvement, and not more than 1/3 of the consideration for increased compensation can be based on the combination of experience and educational attainment. Indiana Code 20-28-9-1.5(b)(1) and (c). Accordingly, while the plan includes increases based in part on experience and educational attainment, there is also a requirement to achieve at least an effective rating to qualify for the annual 2.5% increase in base pay and higher ratings for educational attainment stipends.
3. The plan provides for annual stipends for educational attainment together with a corresponding rating: (i) an annual stipend of \$2,000 for a MA or MS with a performance rating of at least 2.7; (ii) an annual stipend of \$4,000 for an MA/MS plus 15 credits of approved coursework towards a doctorate with a performance rating of at least 3.0; (iii) an annual stipend of \$5,000 for an MA/MS plus 30 qualifying credits and a rating of at least 3.3; (iv) an annual stipend of \$7,000 for a Ph.D with a performance rating of at least 3.6.
4. CASB will pay annual bonuses ranging from \$364 for a performance rating of 2.5, \$4,000 for a "highly effective" rating (3.5), and \$6,500 for a performance rating of 4.0.

On an as-needed basis, CASB offers additional stipends for "Master Teachers" (who both teach and coach other teachers), teachers with needed bilingual skills or multiple certifications, teachers in "hard to hire" subject areas, and teachers who act as coaches or sponsors for school activities.

### Appendix 3: Career Academy Network Pay Plan

**Base Salaries and Bonus Based On Qualifying Experience, Educational Attainment and Performance Evaluation**

Years of Experience	BA/BS with 2.5+		MA/MS with 2.7+		MA/MS/+15 with 3.0+		MA/MS+30 with 3.3+		Base + Stipend with 3.6+	Highly Effective Bonus
	Base Pay with Effective Rating	Highly Effective Bonus	Base + Stipend with 2.7+	Highly Effective	Base + Stipend with 3.0+	Highly Effective	Base + Stipend with 3.3+	Highly Effective		
0	32,000	4,000	34,000	4,000	36,000	4,000	37,000	4,000	39,000	4,000
1	32,800	4,000	34,850	4,000	36,900	4,000	37,925	4,000	39,975	4,000
2	33,620	4,000	35,721	4,000	37,823	4,000	38,873	4,000	40,974	4,000
3	34,461	4,000	36,614	4,000	38,768	4,000	39,845	4,000	41,999	4,000
4	35,322	4,000	37,530	4,000	39,737	4,000	40,841	4,000	43,049	4,000
5	36,205	4,000	38,468	4,000	40,731	4,000	41,862	4,000	44,125	4,000
6	37,110	4,000	39,430	4,000	41,749	4,000	42,909	4,000	45,528	4,000
7	38,038	4,000	40,415	4,000	42,793	4,000	43,981	4,000	46,359	4,000
8	38,989	4,000	41,426	4,000	43,863	4,000	45,081	4,000	47,518	4,000
9	39,964	4,000	42,461	4,000	44,959	4,000	46,208	4,000	48,706	4,000
10	40,963	4,000	43,523	4,000	46,083	4,000	47,363	4,000	49,923	4,000
11	41,987	4,000	44,611	4,000	47,235	4,000	48,547	4,000	51,171	4,000
12	43,036	4,000	45,726	4,000	48,416	4,000	49,761	4,000	52,451	4,000
13	44,112	4,000	46,869	4,000	49,626	4,000	51,005	4,000	53,762	4,000
14	45,215	4,000	48,041	4,000	50,867	4,000	52,280	4,000	55,106	4,000
15	46,346	4,000	49,242	4,000	52,139	4,000	53,587	4,000	56,484	4,000
16	47,504	4,000	50,473	4,000	53,442	4,000	54,927	4,000	57,896	4,000
17	48,692	4,000	51,735	4,000	54,778	4,000	56,300	4,000	59,343	4,000
18	49,909	4,000	53,028	4,000	56,148	4,000	57,707	4,000	60,827	4,000
19	51,157	4,000	54,354	4,000	57,551	4,000	59,150	4,000	62,347	4,000

The pay plan also includes annual bonuses based on performance ratings:

Bonus Plan	
Rating	Bonus Amount
2.4	0
2.5	364
2.6	727
2.7	1,091
2.8	1,455
2.9	1,818
3.0	2,182
3.1	2,545
3.2	2,909
3.3	3,273
3.4	3,636
3.5	4,000
3.6	4,500
3.7	5,000
3.8	5,500
3.9	6,000
4.0	6,500

2. Specify instructional strategies that your school will implement to support the education plan and why they are well-suited for your targeted student population. Describe the methods and systems that teachers will use to provide differentiated instruction to meet the needs of all students.

SASB will use the Core Knowledge Curriculum, widely used nationwide, a research-based sequence of information that prepares children to be knowledgeable and critical thinkers. See [http://www.coreknowledge.org/mimik/mimik\\_uploads/documents/480/CKFSequence\\_Rev.pdf](http://www.coreknowledge.org/mimik/mimik_uploads/documents/480/CKFSequence_Rev.pdf) (description of the grades K-6 programs at pages 2-168).

SASB will also use

- Journey’s language arts program, see <http://www.hmhco.com/shop/education-curriculum/reading/core-reading-programs/journeys>
  - Supplemental language arts program to be determined
  - Spandel and Stiggins “Six Traits in Writing” method
  - Saxon math, see <http://www.hmhco.com/shop/education-curriculum/math/saxon-math>
  - Supplemental math program to be determined
3. Identify any key educational features that would *differ* from your current education model. Explain why you would implement these features, any new resources they would require, and how these features would improve student achievement.

The entire SASB program will differ from the existing (CASB) program since the new schools is for different grade levels.

4. As **Attachment 11**, provide a core curriculum scope and sequence by subject, for each grade level proposed, that demonstrates clear alignment with Indiana’s Academic Standards and the Common Core. The scope and sequence should clearly reflect how the school’s curriculum is integrated across subjects and grade levels served, and how it will result in proficiency. **NOTE: Limit attachment to thirty (30) pages.**

SASB will follow the Indiana Standards curriculum requirements, <http://www.doe.in.gov/standards>, as listed in Attachment 11.

### Pupil Performance Standards

State the proposed school model’s pupil performance standards, consistent with Indiana’s Academic Standards and the Common Core. In particular:

1. Provide, in **Attachment 12**, the school’s exit standards for graduating students *for each division of the school* as applicable (elementary, middle and/or high school). Exit standards should clearly set forth what students in the last grade in each division will know and be able to do. **NOTE: Limit attachment to fifteen (15) pages.**

Since Indiana does not have specified standards for promotion from one grade to the next, SASB will use, in its discretion and upon consultation with parents, the Michigan Grade Level Content Expectations as published at [http://www.michigan.gov/mde/0,1607,7-140-22709\\_28463-162769-,00.html](http://www.michigan.gov/mde/0,1607,7-140-22709_28463-162769-,00.html) (links listed in Attachment 12; for brevity, the linked materials are not printed out and attached).

2. Explain the school's policies and standards for promoting students from one grade to the next. How and when will promotion and graduation criteria be communicated to parents and students?

See response to preceding question.

**High School Graduation Requirements** (*High Schools Only*) Not applicable

#### **School Calendar and Schedule**

1. Provide, in **Attachment 13**, the school's proposed calendar for the first year of operation, as well as the weekly schedule of classes. Provide an overview of academic and non-academic programs, as well as the total number of instructional days in an academic year. Note the length of the school day, including start and dismissal times. Detail the number of instructional hours/minutes in the day for core subjects such as language arts, mathematics, science, and social studies. **NOTE: Limit attachment to ten (10) pages.**

Attachment 13 is the school calendar for the first year of operation (2015-16). Since SASB will be an elementary school, students will stay with a single teacher for most of the day rather than go from class to class. The school day will be from 8:30 am to 4:00 pm. Each day will include two hours of instruction in language arts, two hours of math, one hour of science, one hour of social studies, 40 minutes for lunch/recess, and the remaining 50 minutes for electives (including foreign language: Spanish 30 minutes for three days per week). Intermural sports will be offered after school and during a break at the lunch hour.

#### **School Culture**

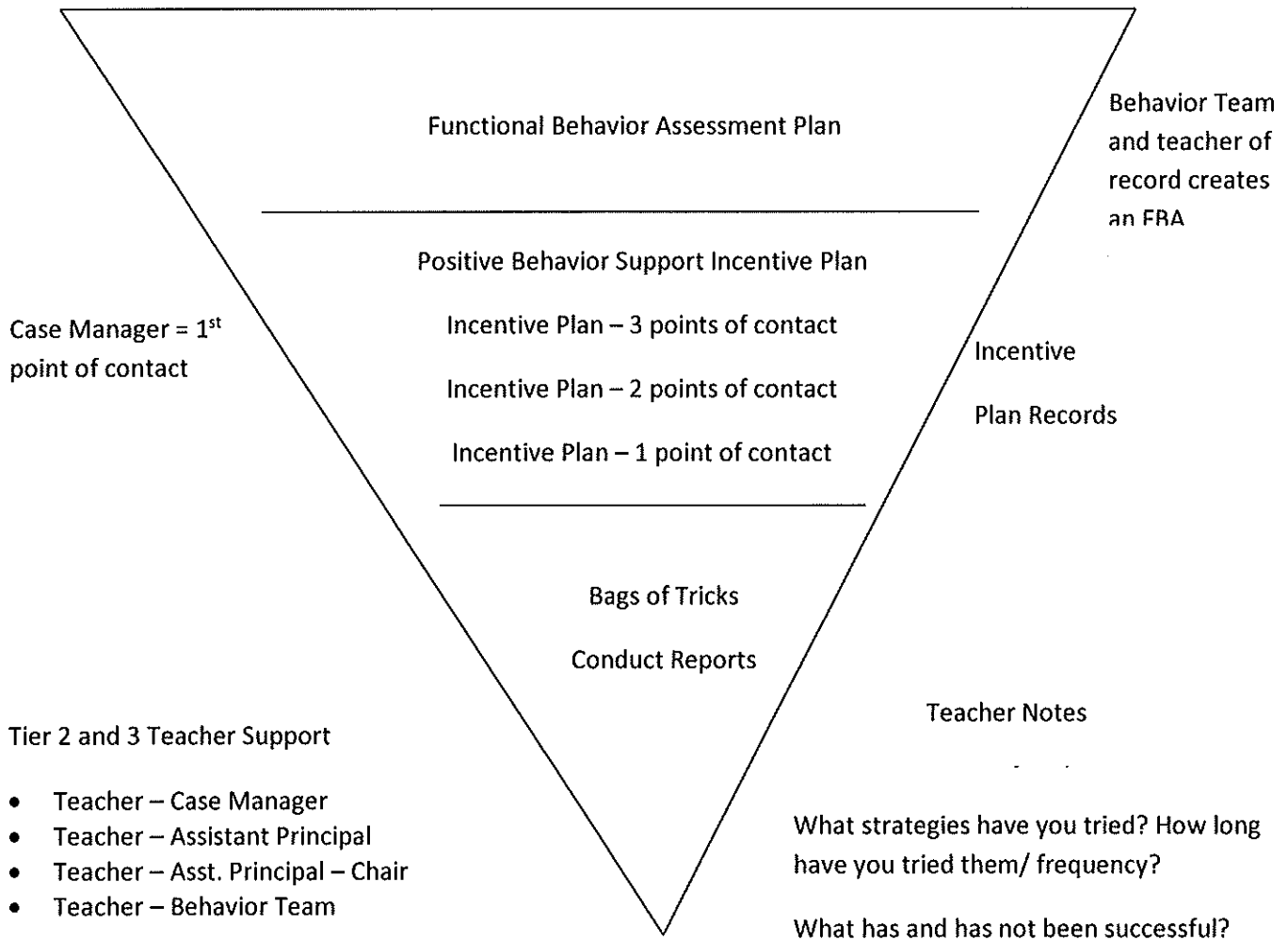
1. Describe the culture of the proposed school and how this culture will promote a positive academic environment and reinforce student intellectual and social development.  
The culture of the school will be based on positive behavior intervention supports (see [www.pbis.org](http://www.pbis.org)): incentivizing, rewarding and motivating positive behavior rather than relying on punitive deterrents. See Appendix 4.



## Appendix 4: School Culture: Positive Behavior Support

Success Academy will use multiple procedures and programs to provide students with a safe and disciplined learning environment. The school-wide Positive Behavior Support (PBS) is a framework for designing and implementing proactive and preventative interventions in an effort to create a positive and safe school environment. Success Academy has adopted “Success Academy where the **search** for excellence never ends.” Students will know they are to show **Self-respect, Effort, Academic Excellence, Responsibility, Cooperation and Honesty** in every part of the building. The system is illustrated as follows:

# RTI for Behavior



The School-Wide Positive Behavior Support System will increase our capacity to reduce school disruptions and educate all students about appropriate behaviors at school. This includes clearly communicated expectations, clearly defined outcomes, research-validated practices, supportive administrative systems, and supportive partnerships among school, families, and the community.

**Features of School-Wide Positive Behavior Support Include:**

- Establish regular, predictable, positive learning & teaching environments.
- Train adults & peers to serve as positive models.
- Teach and model behavioral expectations.
- Create systems for providing regular positive feedback. Catch students “doing the right thing”.
- Improve social competence among students.
- Develop an environment that supports academic success.

**Teacher & Staff Responsibilities:**

- Classroom teachers are expected to teach their students consistent behavior expectations for all settings in the school. Teachers will prepare students by reminding them of appropriate behaviors before entering each critical area.
- Teachers and staff will teach, model and practice each of the behavioral expectations throughout the year with their class.
- Teachers and staff will acknowledge student behaviors that meet the expectations and provide specific positive feedback to students on a regular basis.

This implementation of the school-wide behavior plan should take place during the first week of school. Teachers are expected to take their class to each critical area during the first week to teach the lessons, model, and practice the procedures for that area. The critical areas addressed are the following: before school, cafeteria, recess, assemblies, hallway, restrooms, and after school. All staff members should follow the school-wide plan addressing behaviors in each of the areas.

SASB will use inserts in each school agenda providing students with information regarding life skills and bullying.

All SASB students and their parents will sign the attached Home/School Compact which provide a source for reference throughout the year.

SASB believe that students should be given the opportunity to make decisions and live with the results, whether consequences are good or bad. We believe students should have the opportunity to tell their side of the story (due process hearing) when consequences seem to be unfair, and we believe there should be a logical connection between misbehavior and resulting consequences.

Attachment 1 to Appendix 4: Success Academy School Education Agreement

Our mission is launching lifelong learners who are motivated and contributors to society; who help, respect, and trust each other and have high expectations in achievement.

We the community of Success Academy, established this compact in order to foster respectful behaviors and the core values of honesty, integrity, and responsibility.

**As a student** at Success Academy, I understand that my education is important to me so that I will be a lifelong learner. I pledge to:

- Work hard to do my personal best in class and complete homework on time.
- Discuss with my parents what I am learning in school.
- Have a positive attitude towards self, others, school, and learning.
- Respect the individual differences of other students, their families, and staff.
- Read at home daily.
- Display respect for self, others, learning, and property.
- Make wise choices in television viewing, playing video games, and use of internet.
- Make sensible choices in good nutrition and exercise.

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

**As a parent** of a student I realize that I am the child's first and most important teacher. To encourage my child's learning and success at Success Academy, I pledge to:

- Promote and foster high standards of academic achievement and respect.
- Find out how my child is doing by attending conferences, looking at my child's take home folder, agenda, and calling the school.
- Make sure my child gets appropriate rest each day and arrives to school on time.
- Provide a quiet work place for my child to study each night.
- Supervise completion and return of homework each day.
- Monitor my child's television viewing, playing of video games, and use of the internet.
- Spend 15 minutes each day with my child reading, writing, listening, or just talking.
- Respect, love, and encourage my child's growth and ideas.
- Attend school functions, observe in the classroom, and volunteer when possible.
- Help my child resolve conflicts in a positive nonviolent way.
- Encourage good nutrition and exercise.

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

**As a staff member** at Success Academy, I understand the importance of a positive school experience for every student and my role in the students' educational process. I pledge to:

- Promote and foster high standards of academic achievement and respect.
- Respectfully, frequently, and accurately inform parents of their child's progress.
- Exhibit high expectations for myself, students, and other staff.
- Respect the individual differences of students, their families, and staff.
- Help children to resolve conflicts in a positive, nonviolent way.
- Support school functions.
- Provide a safe place for children to learn
- Model respect for self, others, learning, and property.

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

2. Explain how you will implement this culture for students, teachers, administrators, and parents starting from the first day of school.

See Appendix 4. Student work will be displayed; prizes will be given; student-teacher relationships will be emphasized; team-building exercises will be used. For staff, the process will begin well before school opens (professional development is scheduled to begin 7/6/2015).

3. Summarize, for illustrative purposes, a typical day from the perspective of a student in a grade level of your choice.

Students will arrive ready to learn at 8:30. From the perspective of a 2<sup>nd</sup> grade classroom, the classroom teacher will teach all subject areas throughout the course of the day. There will be a minimum of a 90 minute uninterrupted literacy block for English/Language Arts which includes reading, grammar, spelling, and writing, and a 90 minute block for math. In addition, each classroom teacher will also teach science and social studies. Students will have a one hour block for lunch and recess. Students throughout the course of the week will participate in gym, music, art, library, computers and Spanish, all taught by specialty teachers. The classroom day for students ends at 4:00 pm, providing students with an instructional day of six hours and 50 minutes.

4. Summarize, for illustrative purposes, a typical day from the perspective of a teacher of any subject or grade of your choice.

Teachers will start the school day at 8:00. This is time for teachers to prep for the day, collaborate, and participate in case conferences, behavior team meetings or academic intervention team meetings or an opportunity for a staff meeting. During the student lunch hour/recess, teachers will have a 1 hour block for lunch. While students are participating in specials (gym, music, art, library, computers and Spanish), teachers will have at minimum a one hour block each day for collaboration. Teachers will stay until 5:00 pm, which would be an 8-hour working day.

### **Supplemental Programming**

1. Will you offer summer school? If so, describe the program(s) to be offered. How many students are expected to attend summer school, and how will they be selected for participation? How many hours and weeks of summer school will you provide, and how will it be funded?

Yes. There will be two four-week sessions each summer, to be funded by the Indiana public school summer program fund (no parental tuition payments will be required). It is expected that roughly one-third of the enrolled students will participate in summer school. The school will contact the parents of students needing remediation to suggest summer school. In addition to remediation, the summer school will offer acceleration programs and “camps” in subjects expected to be of interest to students.

2. Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded.

The school will offer general music, band, choir, art, drama, and intermural sports, both during and after school and potentially in summer programs.

3. Describe the school's programs or strategies to address student mental, emotional, and social development and health.

The school will offer comprehensive guidance and social counseling (such as a children-of-divorce program).

4. If applicable, describe any other student-focused activities and programs that are integral to your educational and student-development plans.

SASB will include "Challenge Day" (see <http://www.challengeday.org/>) as part of its social-emotional education program. This program has been well-received at CASB and may be a factor in the success of CASB's anti-bullying program.

### Special Populations and At-Risk Students

**IMPORTANT NOTE:** Pursuant to federal and state laws, charter schools are responsible for meeting the needs of all students enrolled at the school, including those identified with special needs. School personnel shall participate in developing Individualized Education Programs (IEPs), identify and refer students for assessment of special education needs, maintain records, and cooperate in the delivery of special education instruction and services, as appropriate.

1. Summarize the school's overall plan to serve students with special needs, including but not limited to those with Individualized Education Programs, students with Section 504 plans, English Language Learners, students identified as intellectually gifted, and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through deliberate targeting or otherwise. **[NOTE: Questions 2-5 in this section request more detail about how the school will serve each of these student categories. Your response to Question 1 should be a brief summary only.]**

The school will meet the individual learning needs of all students by providing programs, curriculum and instruction in an inclusive setting to the extent possible. Students will receive support services through an inclusive and "pull out" environment depending on the student's individual needs, including students with Individualized Education Plans, Section 504 Plans, English Language Learners, students who are at-risk and those students who are intellectually gifted.

Based on the organization's experience with its existing school (CASB), it is expected that SASB will service a broad range of students within the South Bend community and other surrounding areas and that roughly 65% of the student population will be eligible for the free and reduced lunch program, 5-10 % will be English Language Learners, and 25% will require special education services.

2. Explain how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies and supports you will provide for students with mild, moderate, and severe disabilities, including:
  - a. How the school will identify students with special education needs.
    - The school will hold a move-in conference to develop and update the Individualized Education Plan (IEP) for new students who enroll with an IEP in place.
    - New Student Enrollment Process- The enrollment process will call for the parent/guardian to submit a registration packet, documentation from previous school

corporation, attendance/discipline records, and individualized education plan/504 plan, and evaluation testing, if applicable.

- The school will develop a Student Teacher Response Team (STRT) to identify at-risk students of academic failure. The team will consist of: a principal and/or assistant principal, at least one special education teacher, social worker, general education teachers, school counselor, and any other staff member the team deems necessary.
- To meet the requirement of the Individuals with Disabilities Act (IDEA) to provide services for all students in the least restrictive environment (LRE), the school's special education teachers and staff will work with general education teachers to provide consultation services, inclusion support, co-teaching and/or team teaching support, and/or other special education services as appropriate. Additionally, teachers and staff will provide remedial and enrichment support to students with individualized education plans in a one-to-one, small group or inclusive classroom setting when needed (but making every attempt to service students in the general education classroom setting). Special education teachers will provide support services to general education teachers with accommodations and modifications. Other LRE accommodations may be Resource Rooms, Self-Contained Cross-Categorical Classrooms, or a setting outside of the school when other options have been documented and agreed upon by the case conference committee to meet the student's educational needs. If an at-risk student is not making adequate progress, he/she will be referred to the Student Teacher Response Team.

b. The specific, evidence-based instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with special education needs.

- Tier I, Tier II and Tier III Interventions\*
- Positive Behavioral Interventions and Supports (PBIS)
- Evidence-based practices and strategies such as: providing clear learning objectives, frequent checks for understanding, summarizing, supporting evidence with text, practice and feedback, real world connections, multi-sensory strategy approach, cooperative learning groups
- Reading/ Math Diagnostic Tools to measure benchmark and progress monitoring data- (literacy/numeracy)
- NWEA Map
- Mainstreamed classroom setting/environment

\* Response to Intervention (RTI):

- Tier I: Universal- (Benchmark): Approximately 80% of students will fall into this level and their needs are met in the classroom setting. Students will receive direct instruction from the classroom teacher. The teacher will use a variety of best practice instructional strategies to differentiate instruction to meet the individual learning needs of all students in the classroom setting. In Tier I, teachers will use NWEA MAP assessment to screen all students. Teachers will also use other formal and informal assessments to monitor student progress. Students will be benchmarked at their instructional level- (Tier I) three times a year (Fall, Winter, Spring).

- Tier II: Targeted- (Strategic): Approximately 5-15% of students require more target-specific interventions. Students who are not making adequate progress in the classroom setting, according to benchmark or classroom data, will receive additional support for 20-30 minutes 4 times each week in the morning or afternoon. The students will remain in the intervention groups for 6-8 weeks while being tested regularly using both formal and informal assessments to track progress/data. Students will be strategically monitored (Tier II) every 2-4 weeks for reading fluency, reading comprehension and/or math (According to the individual student's academic need.)
  - Tier III: Intensive- (Progress Monitor): Approximately 5% of students require intensive interventions because their grade level performance and benchmark assessments are significantly below grade level. Students who need intensive support will receive support for 30-60 minutes 5 times a week. Both general education and special education staff members will provide this level of support. At-risk students who are significantly behind in the areas of phonics, fluency and comprehension will receive intensive support, using strategies such as but not limited to Orton-Gillingham, Wilson Reading, and a variety of other evidence-based strategies. The students will remain in the intervention groups for 6-8 weeks while being progress monitored weekly using both formal and informal assessments to track progress/data. Students will be progress monitored (Tier III) every 1-2 weeks in reading fluency, reading comprehension, and/or math (according to the student's academic need).
  - If a student does NOT make adequate progress in Tier III interventions, the school will contact parents, recommend evaluation testing, and refer the student to the Multidisciplinary Team for follow up procedures.
- c. How the school will regularly evaluate and monitor the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals set forth in the Individualized Education Program (IEP).
- The school will manage and progress-monitor IEPs through an online program called Indiana IEP. Every year, a student with an IEP has an annual case review (ACR) to monitor progress according to his/her IEP. At that time, the case conference committee (parent, general education teacher, special education teacher, public agency representative, support staff and any other staff necessary) review and update IEP goals, special education services and strategies based upon their progress toward goals and individual needs. The Case Conference Committee determines the implementation of special education services and support. A parent or special education teacher may request a case conference at any time to review update or revise an IEP prior to the annual case review.
  - In the most cases, the student's IEP progress reports are provided to parents at the end of each grading period or semester.
  - The school will provide progress reports to all students after each grading period.
- d. If applicable, the school's plan for promoting graduation for students with special education needs.  
Not applicable: this application is for a K-4 school.

- e. How the school will provide qualified staffing for students with special education needs.

The school will hire highly qualified Special Education Teachers. Teachers and staff will participate in professional development opportunities prior to the first day of school and throughout the school year in different areas of special education such as implementing IEP in the classroom, providing services in an inclusive setting, positive behavior intervention plans (PBIS), information on the 13 exceptionalities, providing multi-sensory strategies and other professional development topics.

- f. Provide examples from your existing network of schools of how you have adjusted the course scope and sequence, daily schedule, staffing plans, and/or support resources to meet the diverse needs of students at your existing schools.

- Scope and Sequence- All students will be provided with the same educational opportunities.
- Daily Schedule-Career Academy South Bend provides a rigorous learning environment from 8:00 am to 5:00 pm. Students receive an hour for lunch and have the opportunity to take a full collection of classes with a 9-hour school day.
- Staffing Plans- Career Academy South Bend's staff uses data-based decision-making in the development of groups, interventions, and monitoring of student data. Teachers and staff work directly in the development of providing opportunities for student success.
- The school is an at-will employer. Staff are evaluated on an ongoing basis to ensure that all staff members are effective.
- CASB has agreements in place for speech therapy services, occupational therapy services, and psychologist services which will be available for SASB.

3. Explain how the school will meet the needs of English Language Learner (ELL) students, including:

- a. How the school will identify ELL students.

The school will ask about language status as part of the enrollment process as necessary for IDOE reporting purposes. See explanation of the Home Language Survey process at <http://media.doe.in.gov/WebEx/elme/2013-09-03-EnrollStpsEngLrnrs-1/index.html>. For all students identified by the parent as ELL, the school will administer the LAS Links test in accordance with IDOE procedures to identify the need for ELL services.

- b. The specific instructional programs, practices and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.

Since the definition of ELL students includes all who speak a foreign language at home, it is expected that for SASB, as with CASB, few if any ELL students will be at Level 1 or 2, requiring specialized classes. Indiana's English Language Proficiency (ELP) Standards recognize that many ESL students spend most of their day in a mainstream academic setting in English. The ELP standards are intended as an instrument for mainstream classroom, content-area teachers as well as ESL staff and parents of ESL students. See IDOE website at <http://www.doe.in.gov/elme/english-learner-resources>. If the need arises, ELL classes will be taught by teachers licensed to teach English (which is sufficient to meet legal requirements).



- c. How the school will assess and monitor the progress and success of ELL students, including exiting students from ELL services.

Any student requiring specialized ELL services will continue to receive such services until tested as “proficient” per IDOE standards.

- d. How the school will provide qualified staffing for ELL students.

The school’s pay plan, including additional pay for bilingual teachers (see page 28 and Appendix 4 above) and high level of teacher support (see discussion of Master Teachers at Section IV below) will help attract qualified staff.

4. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies and supports you will provide for these students.

The school will use multiple assessment systems:

- DIBELS will be given to each K-1 student on a quarterly basis starting with a beginning of the year assessment (5 assessments a year) and to 2nd grade RTI students who are in tier 2 and/or tier 3.
- NWEA will be given three times a year (fall, winter and spring).
- Fountas and Pinnell reading comprehension tests will be given to (i) kindergarten students at the beginning of the second semester and the end of the year; (ii) grade 1-2 students at the beginning of the year, mid-year and end of the year; (iii) grade 3-4 students who are in RTI (tier 2 and/or tier 3).

Data will be analyzed by classroom teachers, intervention teachers and administrators, and will be used to determine the appropriate targeted and focused intervention by classroom teachers and intervention teachers. Should the data show that tier 3 students are making minimal to no progress, the RTI team will reconvene to discuss possible psychoeducational testing.

Intervention teachers and classroom teachers are highly qualified licensed teachers who will receive professional development analyzing data. They will also be trained in providing focused and targeted instruction through the Comprehensive Intervention Model (CIM) and Orton Gillingham. Intervention teachers will provide tier two and tier three intervention in small groups for the RTI children. This will provide these students with a double dose of reading instruction. The data will be reviewed often to determine the best placement for each child.

Students performing below grade level may benefit from moving for parts of the day to a lower grade level (SASB will utilize multi-age classrooms).

RTI teams are comprised of the principal, a primary classroom teacher, an intermediate classroom teacher, social worker, school psychologist, intervention teacher and the classroom teacher who brought the child to the RTI team. Using assessment data, the RTI team will provide a student-specific intervention plan. The RTI team will reconvene every 8-12 weeks to discuss student growth and the possible next steps based on the data.

5. Explain how the school will identify and meet the needs of intellectually gifted students, including:
- a. The specific evidence-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.

- b. How the school will provide qualified staffing for intellectually gifted students.
- c. How the school will assess and monitor the progress and success of intellectually gifted students.

Intellectually gifted students will be identified and monitored using NWEA scores, the CogAt (Cognitive Abilities Test) system, work samples and ISTEP scores.

SASB will use recognized educational methods appropriate for gifted students including acceleration <http://www.nagc.org/resources-publications/gifted-education-practices/acceleration> (in some cases, moving to a higher grade classroom for portions of the day), curriculum compacting, <http://www.nagc.org/resources-publications/gifted-education-practices/curriculum-compacting>, and pull-out or specialized classes, <http://www.nagc.org/resources-publications/gifted-education-practices/pull-out-programsspecialized-classes>.

SASB's focus on project-based learning is well-suited to gifted students. Teachers will encourage gifted students to undertake projects independently or in teams.

SASB's location next-door to a public library branch will benefit gifted children.

Recognizing that gifted students often wish to work independently, SASB will offer the ALEKS (Assessment and Learning in Knowledge Spaces) Internet-based tutoring and assessment program, <http://www.aleks.com/>.

Recognizing that parental involvement is an important factor for high ability students, SASB will encourage parents of gifted children to review leading resources on education and parenting of gifted children, including but not limited to:

- The ABCs of Gifted, <http://www.nagc.org/index.aspx?id=956> (National Association for the Gifted)
- Considerations and Strategies for Parenting the Gifted Child (National Research Center On The Gifted And Talented) <http://www.gifted.uconn.edu/nrcgt/reports/rm95218/rm95218.pdf>
- Parents' Frequently Asked Questions about Giftedness (Duke University) [http://www.tip.duke.edu/resources/parents\\_students/parent\\_faqs.html](http://www.tip.duke.edu/resources/parents_students/parent_faqs.html)
- SENG (Supporting Emotional Needs of the Gifted), <http://www.sengifted.org/>
- 10 Ways to Help You Raise Kids Who Love Reading (useful for all parents), <http://childrensbooks.about.com/od/forparents/a/resolutions.htm>
- "Super Thinkers ~ Parents' Page, <http://www.superpages.com/enlightenme/pta/>

### **Student Recruitment and Enrollment**

1. Explain the plan for student recruitment and marketing that will provide equal access to any family interested in the new school.

Recruitment for SASB began with families of older children attending CASB (many of whom asked for expansion into lower grades) and includes engagement with community organizations (including but not limited to those listed in Appendix 2 at pages 4-5 above). As of May 8 there are nearly 200 students signed up, before even the beginning of SASB's primary marketing campaign, which will use online formats, warm marketing with dozens of community organizations, news outlets, over a dozen billboards at key locations in greater South Bend, and a

television advertising campaign. As CASB’s demographics reflect, SASB will be open to all Indiana residents.

2. Provide, as **Attachment 14**, 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.

**NOTE: Limit attachment to ten (10) pages.**

See Attachment 14.

### **Student Discipline**

1. Describe the philosophy of student discipline that supports your school model, including procedures to ensure the integrity and authenticity of student work product and assessment scores.

SASB’s philosophy of student discipline is based on positive behavior support as described at page 28 and Appendix 4 above. For protection of academic integrity, testing will be carefully monitored and inconsistent or surprising scores or student work will be reviewed and/or investigated as necessary.

2. Provide as **Attachment 15** 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 parents will be informed of the school's discipline policy.

**NOTE: Limit attachment to ten (10) pages.**

See Attachment 15.

### **Parents & Community**

1. What other school options exist in the targeted location for your proposed school(s)? In list or table format, please describe all other schools – traditional public, charter and/or private – in the immediate vicinity with the same or similar grade level configuration. In the list or table, please include the following information for each school: the most recent enrollment figures by grade level, and the school's 2011-2012 A-F Model (Public Law 221) letter grade as reported by the Indiana Department of Education (“IDOE”). Letter grades can be found on the IDOE website: <http://www.doe.in.gov/improvement/accountability/f-accountability>.

For this purpose it is assumed that “immediate vicinity” means driving distance of less than four miles (as shown by Google or Yahoo maps). Within such geographic distance, the available public schools are as listed below:

K-4	Address	Enrollment 2014-15	Distance	2011-12	2012-13	2013-14
Coquillard	1245 N. Sheridan Ave.	490	0.5	C	D	D
		K: 95				
		Grade 1: 94				
		Grade 2: 116				
		Grade 3: 107				
		Grade 4: 78				
Muessel	1021 Blaine Ave.	410	1.99	F	C	D
		K: 88				
		Grade 1: 101				
		Grade 2: 87				
		Grade 3: 77				
		Grade 4: 57				
Marquette	1818 Bergan St.	428	2.24	C	D	D
		K: 96				
		Grade 1: 114				
		Grade 2: 94				
		Grade 3: 88				
		Grade 4: 36				
Harrison	3302 W. Western Ave.	621	2.46	F	D	F
		K: 117				
		Grade 1: 139				
		Grade 2: 134				
		Grade 3: 126				
		Grade 4: 105				
Madison	832 N. Lafayette Blvd	425	2.69	F	F	F
		K: 95				
		Grade 1: 99				
		Grade 2: 96				
		Grade 3: 82				
		Grade 4: 53				
Perley*	215 South St. Joseph St	232	2.92	F	D	D
		K: 56				
		Grade 1: 46				
		Grade 2: 40				
		Grade 3: 61				
		Grade 4: 29				
Wilson	56660 Oak Rd.	411	3.94	D	B	F
		K: 93				
		Grade 1: 82				
		Grade 2: 95				
		Grade 3: 90				
		Grade 4: 81				

Distances shown are taken from Yahoo Maps (driving distance, not straight-line). The above list excludes Kennedy Primary Academy (609 N. Olive St, 0.5 miles, K-4 enrollment of 490) and Hamilton Traditional School (1530 E. Jackson St, 3.43 miles, K-4 enrollment of 343), both of which were “A” schools for each reported period, since both are magnet schools requiring minimum scores/grades for admission, i.e., these schools are not available to all students, only the most gifted, [https://www.edline.net/pages/Kennedy\\_Primary\\_Academy](https://www.edline.net/pages/Kennedy_Primary_Academy), [https://www.edline.net/files/VXHy0/ad8fe92f7fbcf1b33745a49013852ec4/hamilton\\_brochure\\_1213.pdf](https://www.edline.net/files/VXHy0/ad8fe92f7fbcf1b33745a49013852ec4/hamilton_brochure_1213.pdf).

There are seven private schools within four miles:

K-4	Address	Enrollment 2014-15	Distance	2011-12	2012-13	2013-14
St John The Baptist	3616 Saint Johns Way	42	0.5	C	A	C
		K: 6				
		Grade 1: 6				
		Grade 2: 11				
		Grade 3: 8				
		Grade 4: 11				
Holy Cross Elementary	1020 Wilber St	129	1.5	D	D	C
		K: 19				
		Grade 1: 24				
		Grade 2: 23				
		Grade 3: 29				
		Grade 4: 34				
St. Adalbert Elementary	519 S Olive St	117	2.0	D	C	A
		K: 22				
		Grade 1: 26				
		Grade 2: 21				
		Grade 3: 22				
		Grade 4: 26				
Corpus Christi School	2817 Corpus Christi Dr	99	2.5	A	C	A
		K: 20				
		Grade 1: 23				
		Grade 2: 17				
		Grade 3: 13				
		Grade 4: 26				
Holy Family Elementary	56407 Mayflower Rd	136	2.5	C	D	A
		K: 25				
		Grade 1: 21				
		Grade 2: 31				
		Grade 3: 35				
		Grade 4: 24				
St. Joseph Grade School	216 North Hill Street	262	3.0	A	B	A
		K: 53				
		Grade 1: 55				
		Grade 2: 54				
		Grade 3: 50				
		Grade 4: 50				
Good Shepherd Montessori	1101 E Jefferson Blvd		3.9	No data available		

The enrollment shown in the above tables is for grades K-4 only.

2. What will be unique or compelling about the proposed school(s)? How have you determined that the proposed school(s) will have sufficient demand from student and families to meet enrollment projections?

SASB will be unique in (a) its emphasis on project-based learning; (b) its master teacher/highly collaborative teaching system; (c) its use of technology to help parents help their children (i.e., all teachers will post on a password-protected website not only each day's assignments but video of their classroom presentations); and (d) the architectural innovations described in Section IV below. The school will be compelling (we hope it is not unique since we hope other schools will share) in: (1) the passion, energy, dedication and growth-mindset of its teaching staff; (2), its culture based on positive behavior support; (3) its attention to teaching students emotionally as well as cognitively; (4) its high level of parent communications and involvement; (5) its successful anti-bullying program modeled on CASB's successful program; (6), its offering of before and after school care; (7) its attractive pay and high level of support for teachers; (8) its music and art programs; (9) its thorough integration of technology in teaching both as a method for learning and a skill to be learned; (10) its welcoming of students with disabilities and integrative program for such students; (11) its use of multi-age level classrooms for the benefit of students performing below grade or above grade; (12) its flexibility with gifted students to encourage and assist them in reaching their full potential and enjoying school; (13) its careful use of data to help drive and improve instruction (14) its attention to teaching students time-management and teamwork; (15) its real-world emphasis and involvement of school and students in the broader community; (16) its small-school-within-a-large school atmosphere as well as architecture; (17) its commitment to helping students develop meaningful understanding and communications ability in Spanish, and (18) its openness to collaboration and partnership with other schools. We believe there will be sufficient demand for the school based on the feedback we have received from parents of CASB students, community leaders, teachers, and inquiring potential students and their parents.

3. Describe how you will engage parents in the life of the school, starting from the time that the school is approved. How will the school build family-school partnerships to strengthen support for learning and encourage parental involvement? Describe any commitments or volunteer activities the school will seek or offer to parents.

Upon approval of its charter, SASB will begin communicating with parents through emails, its website, Facebook, phone calls and letters. Parental contact is necessitated before the first day of school since all parents and students are required to sign the School Education Agreement, see Attachment 1 to Appendix 4 above. SASB will hold an annual meeting in the fall of each school year. All parents are encouraged to attend this meeting, which will be designed to provide opportunity for conversation with and feedback on topics including:

- The right of parents to be involved through:
  - SASB Student/Parent/Staff Compact
  - Using the Parent Resource Center
  - Participating in the education of our children through:
    - participating in study trips
    - volunteering in the school
    - attending Family Reading Night
    - attending parent teacher conferences

- attending quarterly awards programs
- mentoring

Other parent meetings will be hosted throughout the school year. These meetings will be held on a flexible schedule to accommodate as many parents as possible. If interpretation is necessary in order to accommodate non-English speaking parents, an interpreter will be provided. Parents will be encouraged to offer suggestions, interact and share experiences with other parents, and participate appropriately in the decision making process about the school's programs.

Success Academy will provide parents with timely information and will encourage parental feedback through the use of:

- parent meetings
- open house and socials
- our school website
- our weekly newsletter
- the Success Academy Handbook for Students and Parents
- student agendas for each grade (including kindergarten)
- report cards
- parent teacher conferences
- individual emails, telephone calls, and personal conversations with parents
- events that help staff build ties between home and school
- parenting classes will be offered
- timely responses to parent suggestions and questions

SASB recognizes and will emphasize to parents that education is a team process and parental participation is enormously valuable to students.

4. What community resources will be available to students and parents? Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Describe any fee-based or in-kind commitments from community organizations or individuals that would enrich student learning opportunities.

SASB students will benefit from the school's ties with community organizations as described at Appendix 2 (pages 4-5 above) above as well as ties to local businesses through association with CASB. SASB's location adjacent to a branch of the St. Joseph County Public Library will benefit all students.

5. Provide, as **Attachment 16**, evidence of demand from the community and support from community partners, which may include letters of intent and/or memoranda of understanding, and should specify the resources to be committed or contributed from the partner, as applicable. **NOTE: Limit attachment to 25 pages.**

See Attachment 16.

## Performance Management

1. Each school authorized by Education One will be evaluated according to a consistent set of indicators and measures agreed upon between the applicant and the authorizer and included in the Charter Agreement. Apart from these indicators and measures, what other goals will students at the school be expected to achieve?  
**NOTE:** Goals must be specific and measurable, and must include a timeline by which the school will determine whether or not students have successfully achieved these goals.

SASB plans to use NWEA (which is used by CASB) as its primary academic test measure, and proposes that the primary measure (other than state-mandated assessments) to be incorporated in the Charter Agreement. SASB will also use instructional methods, such as the Orton-Gillingham reading system, which include assessments of student progress. SASB is open to the use of other assessment systems for charter goals (e.g., Gort, Fountas and Pinenell) as Education One may prefer. The standard for each assessment measure is achievement of at least one year of national-norm growth each school year and corresponding interim growth where the assessment system provides for multiple measures during the year (e.g., NWEA). SASB will also use parent/student surveys to assess student attitudes and school culture.

2. In addition to mandatory state assessment and testing requirements (ISTEP+, IREAD-3, IMAST, ISTAR, and ECA, as applicable), identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year (e.g., DIBELS, Acuity, TABE).

SASB will use the Otis–Lennon School Ability Test (OLSAT) to evaluate the need for instruction oriented to students needing remedial or gifted/talented programs. See pages 31-32 below as to other assessments (DIBELS, Fountas and Pinell, ALEKS, CogAt).

3. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.

Each teacher is responsible for analyzing and utilizing the academic data of the teacher's students to guide instruction. The Master Teachers and leadership team (Principal and Assistant Principal) are responsible for assisting and evaluating teachers in their use of data. CAN's Data Coordinator, Sharon Roeske, will collect and report data to the IDOE and to Education One in accordance with IDOE regulations/guidance and Education One's directions (whether or not specified in the charter).

4. Describe the information system the school will use to manage student performance data. Identify the staff member(s) who will be responsible for warehousing the data, interpreting the data for classroom teachers, and leading or coordinating professional development to improve student achievement.

SASB (like CASB) will use the Harmony school management software system. Sharon Roeske will be responsible for warehousing data. SASB principal Dean Fecher and CAN Superintendent Paul Schlottman will be responsible for interpreting the data and leading or coordinating professional development to improve student achievement.

5. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.

School leaders and teachers will receive training from vendors for commercial assessments (e.g., NWEA) and from the IDOE as to state assessments (ISTEP, IREAD, Acuity, ISTAR).



6. Describe the corrective actions the organization will take if the school falls short of student academic achievement expectations or goals as established by Education One, L.L.C. and the Indiana Department of Education. Explain what would trigger such corrective actions and who would be responsible for implementing them.

If the school fails to achieve its academic goals, it will create and implement a school improvement plan as described by 511 Indiana Administrative Code Article 6.2, Rule 3. For a charter school it is legally sufficient for the charter to serve as a school improvement plan, Indiana Code 20-31-5-2, but the format for improvement plans under 511 IAC 6.2-3 is well-established and useful for purposes of accountability to the IDOE as well as Education One. The defining trigger for such action should be stated in the charter per Education One's policies.

**SECTION III: IMPLEMENTATION PLAN**

**Human Capital**

**Network-wide Staffing**

Complete the following table indicating your projected staffing needs for the entire network over the next five years. Include full-time staff and contract support that serves the network 50% or more. Please adjust school types, and staff functions and titles as needed to reflect your network's organizational plans.

	Year 1	Year 2	Year 3	Year 4	Year 5
Number of elementary schools	1	1	1	1	1
Number of middle schools	1	1	1	1	1
Number of high schools	1	1	1	1	1
<b>Total schools</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>3</b>
Student enrollment	1145	1300	1300	1300	1300
<b>Management Organization Positions</b>					
Superintendent	1	1	1	1	1
Administrative Assistant to Superintendent	1	1	1	1	1
Director of Information Technology	1	1	1	1	1
Director of Facilities	1	1	1	1	1
Asst. Facilities Director	1	1	1	1	1
Director of Special Education	1	1	1	1	1
Director of Human Resources	1	1	1	1	1

	Year 1	Year 2	Year 3	Year 4	Year 5
Director of Student Services	1	1	1	1	1
Director of Development	1	1	1	1	1
Data Coordinator	1	1	1	1	1
Business Manager	1	1	1	1	1
Asst. Business Manager	1	1	1	1	1
Accounting Clerk	1	1	1	1	1
Buyer	1	1	1	1	1
Director Workforce Development	1	1	1	1	1
Development Coordinator	1	1	1	1	1
Athletic Director	1	1	1	1	1
Marketing Intern	2	2	2	2	2
School Resource Officer	1	1	1	1	1
IT Support Technician	1	1	1	1	1
<b>Total back-office FTEs</b>	<b>21</b>	<b>21</b>	<b>21</b>	<b>21</b>	<b>21</b>
<b>Elementary School Staff (K-6)</b>					
Principal	1	1	1	1	1
Assistant Principal	1	1	1	1	1
Administration Intern	1	1	1	1	1
Secretaries	2	2	2	2	2
Nurse	1	1	1	1	1
Classroom Teachers (Core Subjects)	23	30	30	30	30
Classroom Teachers (Electives)	7	7	7	7	7
Special Education Teachers	7	7	7	7	7
Special Education Para	1	1	1	1	1

	Year 1	Year 2	Year 3	Year 4	Year 5
Title 1 Para	2	2	2	2	2
Hall Monitor	1	1	1	1	1
Social Worker	1	1	1	1	1
In House Subs	2	2	2	2	2
<b>Total FTEs at elementary schools</b>	<b>52</b>	<b>59</b>	<b>59</b>	<b>59</b>	<b>59</b>
<b>High School Staff (7-12)</b>					
Principal	1	1	1	1	1
Assistant Principals(Discipline, Curriculum)	2	2	2	2	2
Nurse	1	1	1	1	1
Counselor	1	1	1	1	1
Security/ Hall Monitor	1	1	1	1	1
Social Worker	1	1	1	1	1
Classroom Teachers (Core Subjects)	24	24	24	24	24
Classroom Teachers (Electives)	9	9	9	9	9
Secretaries	5	5	5	5	5
In-School Detention Supervisor	1	1	1	1	1
Special Education Teachers	6	6	6	6	6
Special Education Paras	2	2	2	2	2
In House Subs	2	2	2	2	2
Title 1 Para	2	2	2	2	2
<b>Total FTEs at high school</b>	<b>58</b>	<b>58</b>	<b>58</b>	<b>58</b>	<b>58</b>
<b>Total Network FTEs</b>	<b>110</b>	<b>117</b>	<b>117</b>	<b>117</b>	<b>117</b>

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

1. If the organization is applying for more than one charter, explain your process and timeline for developing or identifying leaders across each of your Indiana schools. How does this process align with the 5-Year Growth projections described in the business plan? Who will lead this process? How much will it cost?

Not applicable: this application is for one charter.

2. Describe your strategy and timeline for recruiting and hiring teachers across the network. Explain key selection criteria and any special considerations relevant to your school design. What key partnerships will support staff hiring? Identify known sources from which you will recruit teachers.

CAN (SASB as well as CASB) will recruit experienced teachers through its website, the IDOE teacher job-search website, other job-search websites, word-of-mouth referrals, and occasional direct mail. A critical element of recruiting high-quality teachers is an attractive compensation program, see Appendix 3 above, but in the long run (especially for *retaining* effective teachers), CAN believes that the school's culture and high level of support for its teaching staff will be equally important. The teaching staff also includes a significant number of new graduates from schools with strong teacher education programs, particularly Ball State University, Michigan State University, Miami University (Ohio) and Loyola University (Chicago): the annual job fairs for new graduates of those schools have been a focus of CAN's recruitment. CAN uses a structured interview system (HUMANeX Ventures interview) designed to identify teachers with the personality traits and attitudes (as well as content knowledge) necessary for highly effective classroom ability. CAN believes from its prior experience with the HUMANeX system that it is an effective measure.

3. Describe the staffing plan (e.g., leadership, instructional, and support roles; reporting relationships; and accountability for student outcomes) your network will use to ensure that every student at each school has access to excellent

teaching? Will the staffing model incorporate technologies, new roles for teachers and other staff, or innovative instructional techniques toward that end? If yes, how?

SASB will use experienced Master Teachers with records of highly effective performance as mentors and coaches for other teachers, not only in scheduled days/afternoons set aside for professional development but on a daily basis during the period set aside for professional development during the PLC (Professional Learning Community) common planning time each day. There will be a Master Teacher for each SASB grade level. The Master Teachers will be evaluated not only on the performance of students whom they teach directly but the success of students taught by the teachers they are responsible for coaching and mentoring. All teachers will be instructed in the use of technology both as a method of teaching and as a skill to be taught to students. More importantly, teachers will be instructed in use of technology to analyze assessment and achievement data and as a method for sharing instruction with parents via the Internet (teachers will record direct instruction and post it, with their lesson plans, on a local secured network, assessable to parents and student using an assigned student password). Parents will be able to utilize the recorded direct instruction to help teach their children. The use of project-based learning is conducive to interaction among teachers as well as students.

4. Explain how – and how frequently – the school/network will evaluate the performance of the school leader and teachers. What key elements will drive evaluations, and who will conduct them?

SASB's principal and assistant principal will conduct two short assessments (see attached Appendix 5 identifying the elements of evaluations) and one intensive long assessment of each teacher in each semester. Both short and long term assessments will be unannounced, which is critical for a true measure of teacher performance. SASB will use a Marzano Modified RISE system for teacher evaluation. Staff surveys as well as student performance (NWEA, Acuity, ISTEP, IREAD and Otis-Lennon scores) shall be used as a factor in evaluations of school leaders, which will be done each semester.

5. Explain how the school/network would handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover. How will the school/network identify and address development needs or concerns?

Teachers assessed as ineffective will be counseled through use of a Performance Improvement Plan identifying necessary corrective actions, and will observe effective teachers in their classrooms. If a teacher fails to make the adjustments called for by a PIP after receiving demonstrations and the opportunity to change, it will be necessary for the school to terminate the teacher's employment. The same will be the case for leaders.

6. Provide an overview of the organization's compensation system (including benefits) and how this aligns with the performance evaluation process. For legislative requirements regarding employee benefits, see for example the following: IC § 20-24-6-7.

The school's compensation system is described at Appendix 3 above. As noted at Appendix 3, it is necessary to achieve at least an "effective" rating to qualify for the annual 2.5% increase in base pay. The school offers licensed personnel the opportunity to participate in the Indiana Teacher Retirement Fund and offers all employees the opportunity to participate in a 401k plan to which the school contributes, for all employees not already receiving such contributions through the employer's contributions to TRF, 7.5% of compensation (regardless whether the employee contributes any portion of salary).

## Success Academy Classroom Short Assessment Format

This form can be used by the evaluator to make short observations and comments regarding what is seen during 10 to 15 minute classroom visits at varied times within the same period of instruction. The Snapshot assessment is to be shared with the teacher and may be used to support recommendations made on the summative assessment to be completed by April 30 of each school year.

Teacher: \_\_\_\_\_

Date: \_\_\_\_\_

Characteristic	Evident/ Not Evident/ Comments
1. Well-developed planning was evident. The teacher was able to express the reasons for the learning activity of the day. Use of student data as a source for adjusting planning to meet students' needs was recognizable.	
2. There is a clear indication that the lessons are aligned to standards appropriate for the grade level with an emphasis on mastery of the content presented rather than coverage alone. It is evident that instructional priorities have been developed based on pre- and/or post test results.	
3. Instructional materials and equipment needed for lesson are prepared and ready at the time of the instructional period. The teacher uses technology resources to enhance the lesson. Students are engaged and use time wisely during the period of instruction.	
4. Students engage from the beginning of the lesson based upon the teacher's method for capturing their attention to set up the rationale for the lesson. Students are motivated to engage in the lesson due to the problem or questions posed, and have a clear understanding of the goals or expectations of the lesson activity.	
5. The teacher demonstrates a thorough understanding of the material being taught. Students are encouraged to work independently or cooperatively in order to develop understanding and mastery through guided and independent practice. It is clear that the majority of the students understand the concept being taught.	
6. At least 95% of the class show active, positive engagement during instructional time. Students are given work that is challenging, but not overwhelming. Students can explain what they are studying and how it applies.	
7. Student learning styles are addressed by the teacher's use of differentiated teaching strategies that reach the learning modes of students. Students with differing abilities are able to grasp the concept of the lesson and can apply or explain how to apply what they are learning.	
8. The teacher guides the student learning through multi-layered questioning skills that assesses understanding from basic comprehension to Higher Order Thinking levels of application, evaluation and synthesis. Students are encouraged to apply and build skills beyond basic skills.	
9. The teacher demonstrates abilities to use diagnostic methods to determine student understanding, including the use of open-ended questions to expose student misunderstandings and mastery of material at different levels of learning.	
10. Students demonstrate meaningful engagement based upon the teachers ability to use formal and informal assessments to assess student progress and understanding. Student participation is high due to assigned work being relevant and connected to student interests, experiences and/or curiosities.	
11. Feedback to student supports learning based upon timeliness, clarity, and honest expression of the student's strengths and weaknesses. The teacher constantly checks for understanding and redirects the path of the lesson in order to reinforce comprehension and application of information taught.	
12. Classroom is clearly a safe and orderly environment that supports student learning and positive engagement. Clear evidence exists to support that expectations and procedures are in place and disruptions rarely occur.	
13. Student interest and engagement is clearly evident through class participation in discussion, group and individual work periods. Students are able to explain what they are studying and why it is important to learn.	
14. The classroom climate is consistent and supportive of student engagement. Students are respectful to one another, to the teacher and to visitors. Students are recognized for successes and given positive encouragement.	
15. There is clear evidence that students are progressing appropriately in the mastery of presented content based upon student responses and other demonstrations of student understanding.	

Overall Observations and Comments:

Observer: \_\_\_\_\_

Date Provided: \_\_\_\_\_

Teacher: \_\_\_\_\_

Date Received: \_\_\_\_\_

## Professional Development

Describe the professional development that will be offered to school leadership and teaching staff. This description should explain how professional development for the faculty will support the education program and build capacity to improve student achievement, and should include the following:

1. Describe how school leaders will be supported and developed throughout the year.

SASB's principal, Dean Fecher, will report to CAN's superintendent, Paul Schlottman, who will consult and review on an ongoing basis. Among other matters, Paul will coach Dean as to the use of NWEA data. Dean will monitor and advise the administrative staff reporting to him as well as SASB teachers.

2. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.

Professional development will begin on July 6, 2015 when SASB teachers begin employment. The six weeks prior to the August 17 start of school will be devoted to staff training and orientation. The school's assessment methodologies, including NWEA, will be reviewed. Teachers will be trained in the use of Otis-Lennon School Ability Test. Teachers trained in Orton-Gillingham reading instruction will introduce the program, in which all SASB teachers will gradually be trained. All teachers will receive training in methods of project-based learning. During the pre-opening preparation period, it is essential that the teaching staff begins the high-trust, high-support collaborative culture which will be the basis for on-going PD throughout the year.

3. Include the expected number of days/hours for professional development throughout the school year and explain how the school's calendar, weekly schedule, and staffing plan will be structured to accommodate this plan. Explain how professional development will be aligned with the interim assessment process and adjusted during the year to address areas of need that are identified.

The school calendar (Attachment 13) includes recurring set-aside periods for professional development, generally from 2pm to 5pm for two days each month:

August 26: 2pm-5pm

September 9 and September 23: 2pm-5pm

October 7: 2pm-5pm

October 21: full day

November 4 and November 18: 2pm-5pm

December 2 and December 16: 2pm-5pm

January 13 and January 27: 2pm-5pm

February 10: full day

March 9 and March 23: 2pm-5pm

April 27: 2pm-5pm

May 11 and May 25: 2pm-5pm

4. Explain how the professional development program will be evaluated – at both the school and network levels – to assess its effectiveness and success.

The success of the PD program and for the leadership team will primarily be the success of students as reflected by the academic assessments used by the school, particularly measures tied to growth. Recognizing that socio-emotional factors are critical for long-term success, SASB will also measure student attitudes/culture through use of parent surveys (and for older children, student surveys) and will evaluate its success as an employer through staff surveys.

## Start-Up & Operations

- **Start-Up Plan.** Provide, as Attachment 17, a detailed start-up plan for the period leading up to the first day of student attendance for the first proposed school described in the application (or schools, if the organization intends to open more than one school in Year 1). **NOTE: Limit attachment to ten (10) pages.**
  - a. The Start-Up Plan must indicate the targeted first day (month, day, year) of student attendance.
  - b. The Start-Up Plan must specify planning tasks by month, and responsible individuals. See Attachment 17
- **Start-Up Staffing and Costs.** Complete the Start-Up (Year 0) Budget and Staffing worksheets in the Budget and Staffing Workbook (be sure to complete all pages in the Budget and Staffing Workbook, and provide as Attachment 19).

See Attachment 19.

- **Transportation.** If the school will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events. Describe how the school will comply with the federal McKinney-Vento Homeless Assistance Act, 42 USC 11431, for homeless students, as well as the Individuals with Disabilities Education Act and 511 IAC 7-43-1(u), if applicable.

SASB will not provide transportation for its students to and from school. Transportation for field trips and athletic events will be provided by 14-passenger vans. The McKinney-Vento Homeless Assistance Act, 42 USCS § 11431, provides for access to schools for homeless youths, which per a non-regulatory guidance <https://www2.ed.gov/programs/homeless/guidance.pdf> concerns enabling homeless students to attend their “school of origin” – meaning the school last attended before becoming homeless; accordingly, this law, since it relates to a school where the youth is now living providing transportation to the school in the district where the youth previously lived, is not applicable to a charter school since a charter school does not serve a geographic district. Under 511 IAC 7-43-1(u), if SASB has a disabled student whose health, mobility, or behavior necessitate special transportation, SASB will contract for transportation services (as CASB does).

- **Safety and Security.** Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.

Attached as Appendix 6 (at the end of this application) is the safety plan posted in every CASB classroom. A similar safety plan will be posted in each SASB classroom.

Security personnel: SASB will employ a hall monitor and will share a school resource officer with CASB.



Security technology: SASB will have a “double airlock” (door-lock) system. Anyone entering the building during school hours will need to enter through the office and sign in with the receptionist

Security policies: SASB will have a visitor badge system identical to CASB. Everyone who is not a student will wear an identification badge (employee badges will electronically open the locked entrance doors)

Security equipment: SASB will have fire extinguishers throughout the building as well as a sprinkler system as required by school building codes.

- **Technology Specifications and Requirements.**

- a. Describe all technological equipment and services that the charter school will provide, including hardware, software, connectivity, and media storage devices, and property controls and equipment tagging that will be in place. Specify any equipment or technological support that students and families will be responsible for purchasing or obtaining.

CASB uses and SASB will use the latest Microsoft Technologies including building based systems and cloud based systems. The school will provide Office 365 to all staff and students allowing them to use an online version of Office products from any device with an internet connection and it also gives them the ability to install the offline full version of Office on three computers for home use or personal use. Staff and students will be interconnected using the latest Cisco technologies including wireless access to school resources and a broadband connection to the internet. All equipment in the school will be tracked and monitored through web services and devices connected to the network. The school will also provide 1TB of online storage for every student. Some students may elect to carry around their work on USB Flash Drives that they provide for their own use.

- b. Describe the scope of technical support that will be provided, including where support staff will be located, and the hours (including weekends and holidays) and manner in which the support will be accessible to students and school employees.

The CAN support system operates 8am-5pm Monday through Friday. Though these are the established hours, staff have the ability to contact technical support staff directly via cell phones provided by the school in cases of emergency. All staff can submit tickets to the help desk using email and their requests are handled by priority and in the order they were received.

- c. Describe the charter school's data retention, security, and confidentiality procedures.

The school will use several technologies that secure data stored on school systems. These technologies include physical security of the servers, video monitoring of systems and encryption of backed up data. All access to these systems is logged.

- d. Describe procedures to deliver instruction when equipment, software, or connectivity at any location is lost or impaired. Specify who will pay for Internet connectivity and address minimum bandwidth and a course of action for areas of the state that do not have the minimum bandwidth (if applicable).

The school pays for and provides all instructional equipment needed in the classroom. When these technologies are not functional, spares will be provided as needed. When no spares are available, teacher return to the basics and teach using their project based skills.

- e. Describe data protection and recovery procedures in event of catastrophic system failure (include offsite back-up).

CAN uses an online backup system to backup critical data on a scheduled basis. There is not currently an off-site backup system but with the completion of the new school, backups will be sent to both sites so that each site has a backup of the other site.

- **Insurance Coverage.** Charter schools authorized by Education One, L.L.C. will be required to indemnify the Education One, L.L.C., Trine University, the Indiana Department of Education, any related entities, and their respective members, officers, employees, officials and agents. In addition, charter schools must obtain liability insurance coverage naming Education One, L.L.C., Trine University, and the Indiana Department of Education as Additional Insured on a primary basis. The applicant should provide, as **Attachment 16**, an estimate from an insurance agent/broker for insurance coverage. **NOTE: There is no page limit for this attachment.**

See Attachment 18.

## Facility Plan

*Note: Virtual operators should tailor their responses to this section as applicable for their specific instructional and operational models.*

1. If you are in the process of identifying a facility, describe with as much detail as possible your plan for identifying a target location, any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc. Charter school facilities must comply with state and local health and safety requirements as described in IC § 20-26-7, 20-24, and as required by the Indiana State Department of Health, Office of the State Fire Marshall, Department of Public Works, and the corresponding local agencies. In addition, charter school applicants must be prepared to follow applicable city or town planning review procedures. Describe the organization's capacity and experience in managing these strategies, including managing build-out and/or renovations. Detail the specific interactions the applicant group has had with state and local agencies to determine whether the identified facilities are suitable and affordable. Explain the inputs, including specific sources of information, the applicant group has used to project all facility related costs. These inputs should be reflected in the facility related expenses included in the 5-Year Budget.

Not applicable.

2. If you have already identified a facility, or plan to locate the new school within a facility currently owned or leased by the applicant, please indicate the street address and applicable school district. Describe the facility, including whether it is new construction, part of an existing public or private school building, or part of another type of facility. Provide a detailed list of any anticipated construction or renovation costs (these should be described in the budget narrative and reflected in the budget). If possible, provide a layout and description of the proposed facility. Include the number and size of classrooms, common areas, recreational space, any community facilities, and any residential facilities. Explain how the facility will meet the needs of any students who are physically challenged.

The applicant has purchased a site for the school at 3408 Ardmore Trail, South Bend, which is within the South Bend Community Schools Corporation. Extensive renovation is underway: the building on the site, which was previously a Target store, is a concrete box measuring roughly

90,000 square feet, so the renovation involves building interior rooms and hallways, installing plumbing, a new roof, cutting windows into the walls, and much else. Attached is a list of estimated renovation costs, totaling roughly \$14 million, which will be covered by loans and grants from the Garatoni-Smith Family Foundation and a \$1 million loan from the City of South Bend. Also attached (at the end of this application) is a floor plan. The building will have five kindergarten and five first grade classrooms and four classrooms each for grades 2-6, with a central pod area for each grade. There will be an auditorium, a music room, classrooms for Special Education, offices, many bathrooms, a cafeteria and kitchen, an indoor play area, an outdoor playground, and an adjacent gymnasium. With the gymnasium, the completed construction will be 102,887 sf with 130,710 sf for parking and 202,134 sf for open space (yards, landscaping, etc.) The school has agreed to allow the public to use the playground after school hours. There will be no residential facility. The building will be ADA-compliant.

3. If the organization is applying for more than one charter, describe your plan for identifying and financing a sufficient quantity of facilities to align with the organization's 5-Year Business Plan.

Not applicable.

## Budget & Finance

**IMPORTANT NOTE:** Schools chartered by Education One are required to adhere to Generally Accepted Accounting Principles (GAAP)/ the accrual-basis method of accounting. Schools are also required to comply with all relevant policies as required under Indiana statute by the Indiana State Board of Accounts: <http://www.in.gov/sboa/>  
For multi-site operators or networks, Education One requires individual school and network-level financial budgeting, reporting and annual audits. Each Indiana school's finances must be transparent and distinct from the network level.

1. Describe the systems and processes by which the organization will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted for the school. What financial controls will be in place at the network and school levels to ensure long-term financial viability?
2. Provide, as **Attachment 19**, a detailed 5-Year Pro-Forma Budget for the organization at the network level AND for each school described in the application. **Applicants proposing to operate a network of schools must provide a network-level budget (no template is provided).** Applicants must also complete the Budget and Staffing Workbook Template (all worksheets) for each proposed school. If the school-level budget will be approximately the same for each school described in the application, state so clearly and submit a completed Budget and Staffing Workbook for one school only. **NOTE: There is no page limit for this attachment.**  
See Attachment 19.
3. Provide, as **Attachment 20**, a detailed budget narrative that provides a high-level summary of the budget and how the budget aligns with the 5-Year business plan. **NOTE: Limit attachment to five (5) pages.** The budget narrative should clearly describe assumptions and revenue estimates, including but not limited to the basis for Per-Pupil Revenue projections, staffing levels, facilities expenses, and technology costs. The narrative should specifically address the degree to which the network and school budget will rely on variable income (e.g., grants, donations, fundraising). Please address the following when completing the pro-forma budget and the budget narrative:

- a. What is the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget?
- b. Explain 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.

See Attachment 20.

**IMPORTANT NOTE:** Applicants are encouraged to contact the Indiana Department of Education's Office of School Finance at (317) 232-0840 for additional guidance about Per-Pupil Revenue for budget planning purposes. Note that all budgets should assume a July 1-June 30 fiscal year.

## SECTION IV: INNOVATION

Education One is particularly interested in applicants that propose school models with strong potential to accelerate student success through dramatically different school designs, instructional strategies, uses of technology, staffing models, governance arrangements, family and community engagement strategies, and other approaches.

### Foundations of Innovation

Summarize the innovation(s) embodied in the proposed school design and/or implementation plan. The summary should include, at a minimum, the following:

- An explanation of how the proposed model is fundamentally different from typical school models,
- Any available evidentiary basis for the efficacy of the model or for the ideas underlying the model,
- An explanation of how the model will still permit the ICSB to hold the operator to the same high accountability standards to which it holds all authorized schools.

The fundamental innovation at SASB will be the focus on project-based learning (PBL) as described at page 22 above. The benefits of PBL rather than traditional content-based/lecture style teaching are well-documented, e.g., *Pathways To Prosperity: Meeting The Challenge Of Preparing Young Americans For the 21st Century*, at page 27, Harvard Grad School of Ed (Feb 2011), [http://www.gse.harvard.edu/sites/default/files/documents/Pathways\\_to\\_Prosperty\\_Feb2011-1.pdf](http://www.gse.harvard.edu/sites/default/files/documents/Pathways_to_Prosperty_Feb2011-1.pdf). SASB will utilize the Project Lead The Way "Launch" program for kindergarten through grade 5, see <https://www.pltw.org/our-programs/pltw-launch> but the PBL approach will not be limited to the PLTW curriculum; it will be incorporated in all teaching. This is fundamentally different from traditional schools. The use of PBL is consistent with application of accountability standards.

SASB will also follow CASB's innovative practice of having not only all assignments but teacher presentations posted on secure websites for each class so that parents and students will be able to access assignments and teacher presentations from home (students may also review presentations during class hours; this facilitates differentiated instruction such as for students who need repeated presentations while other students prefer to pursue other topics). Allowing parents to access assignments and presentations from home will encourage parents to become involved in their students' learning.

## Description of Innovation(s)

Describe proposed innovation(s) in **one or more of the following categories**. For each applicable category, explain how the proposed school design and/or implementation plan will address the key elements listed below.

### Teaching

Innovative school models can increase access to excellent teaching and rigorous and challenging academic programs for all students, including those in rural areas.

#### Key elements include:

- Use of staff roles, technology, compensation structures, and/or other aspects of school design and/or implementation to enable the school to reach more students with excellent teaching;
- Identification of the adult(s) accountable for each student's outcomes, and clarity on adult roles and duties; and
- Financial sustainability over the long-term within budgets available from per-pupil funding

The key elements above would not be met, for example, through class-size reductions alone or by simply shifting student time from teachers to technology. One example of school models that can be used to meet these key elements can be seen at [opportunityculture.org/reach/](http://opportunityculture.org/reach/).

In the terms used at the [opportunityculture.org/reach/](http://opportunityculture.org/reach/) website, SASB will utilize a “Multi-Classroom Leadership (In-Person Pods)” model: “Master Teachers” with extensive experience and a proven record of success will serve as coach/mentors for other teachers. Time is reserved each day, see page 32 above (at minimum a one hour block each day for collaboration). This was implemented at CASB in 2014-15 and has worked well. SASB’s model will come within the description at <http://opportunityculture.org/reach/multi-classroom-leadership-in-person/>. The compensation system is as described at Appendix 3 (page 33) above.

### Technology

In addition to its uses to increase access to excellent teaching (above), technology can be used to personalize learning through digital content and the strong collection and application of student data.

#### Key elements include:

- Enabling students to use technology as a learning tool for a significant portion of the school day;
- Use of technology and computer-adaptive learning systems to personalize and differentiate instruction; and
- Financial sustainability over the long-term within budgets available from per-pupil funding

Examples of innovative uses of technology include using cutting-edge software to tailor instruction and using real-time data to inform instructional needs. This category of innovation does not include hardware purchases alone (e.g., one-to-one laptop programs; interactive whiteboards); it requires thoughtful integration of hardware and software into the school design and implementation plan.

The SASB use of technology, as described above under “Start-Up & Operations/Technology Specifications and Requirements” (page 44-45) will make the use of computers and software tools an integral part of the school day. Built-in fiber optic connections in each classroom will provide faster connectivity than wifi-systems. Teachers will be trained in the use of IT in instruction (SASB is aware of the failure of many one-to-one programs which lacked appropriate training).

## Time

Some innovative models can fundamentally alter school schedules and calendars to dedicate more time to high-value academic work.

### Key elements include:

- Changing schedules to give students more quality academic time; and
- Financial sustainability over the long term within budgets available from per-pupil funding

Examples include highly structured extended school days and school years that maximize use of students' academic time, and models that enable students to control a significant portion of their own learning time (often in conjunction with technological innovations). Innovation in this area must include more than simply adding time to the day or days to the school year; it requires thoughtful use of that time to improve student outcomes.

The school will have an extended school day (8:30 am to 4:00 pm) and school year (roughly ten days more than the state-required 180 days, depending on snow days). Days will be highly structured (see page 32 above) to ensure a focus on core subjects. With project-based learning and extensive use of PCs, students will control a significant portion of their learning time. For working parents, the school's offering for before-school care starting at 6:30 am and after-school care until 6:00 pm will be a valuable benefit.

## Other Innovations

The three categories above are not exclusive. An applicant may propose a model centered on innovation in curriculum, instructional strategies, assessment, governance, family and community engagement strategies, or other areas, or in a combination of two or more areas.

The school will be innovative architecturally. Each grade's classrooms will be clustered around a pod/meeting area for that grade, where performance data will be posted (without student identification other than by number), projects can be worked on, and the teacher collaboration meetings will be held. Built-in fiber optic connections will provide high bandwidth connectivity. Ample skylights and windows will provide natural light. The large indoor play area will allow students to have recess/recreation even in bad weather. A low-frequency FM broadcast will allow parents to hear school messages while waiting to pick up their children. Pick-up will be relatively quick and efficient via use of radio chips to be installed in vehicles, connecting to a system within the building allowing teachers to know which parents are in which of the pick-up lanes and where parents are in the line, so that the right child can be at the pick-up point at the right time.

## SECTION V: PORTFOLIO REVIEW & PERFORMANCE RECORD

Education One, L.L.C. will base qualification decisions, in substantial part, on the organization's past performance. Provide the following information about all schools operated by the organization, including any ESP partner. Education One may request additional information from applicants at any time during the review process.

1. As Attachment 21, provide a summary of every school in the organization's portfolio (including every charter school managed by the proposed ESP partner, if applicable) in an Excel workbook. Please include the following information for every school:
  - Year opened;
  - City/location and school contact information;
  - Contact information for the authorizer;
  - Number of students and grade levels served;
  - The following student demographic and socioeconomic data: free/reduced-price lunch status, race/ethnicity, Special Education, and English Language Learner;
  - The year in which the contract with the ESP commenced and/or ended (if applicable);
  - State assessment results for the past five years by grade level in English/Language Arts and Mathematics; and
  - Growth and/or value-added results for the past five years by grade level in English/Language Arts and Mathematics. Please indicate what instrument (e.g., NWEA, state growth model) was used to determine the growth and/or value-added results.
  - *For High Schools Only:*
    - 4-year graduation rates;
    - College and career readiness indicators, such as: the number and percent of graduating students taking and passing Advanced Placement or International Baccalaureate exams; and
    - The number and percent of graduating students who have enrolled in post-secondary institutions. If the school has not historically collected such data, please briefly explain this.

**NOTE: There is no page limit for this attachment. If an operator or ESP manages multiple schools, please include one introductory worksheet in the Excel workbook summarizing state assessment results, growth and/or value-added data, and (if applicable) high school graduation rates and college and career readiness indicators, by school for the past five years.**

Data as to CASB is shown in Attachment 21.

2. Select one or more of the consistently high-performing schools that the organization operates and discuss the school's academic performance. If possible, select a school with similar demographics to the targeted Indiana student population described in your application.
  - Be specific about the results on which you base your judgment that the school is high-performing. Include student achievement status, growth, absolute and comparative academic results, as available.
  - Discuss the primary causes to which you attribute the school's distinctive performance.
  - Discuss any notable challenges that the school has overcome in achieving its results.
  - Identify any ways in which the school's success has informed or affected how other schools in the network operate. Explain how the effective practice, structure or strategy was identified and how it was implemented elsewhere in the network.

This question is not applicable: the applicant does not have multiple other schools and has none offering grade levels for the proposed SASB.

3. Select one or more of the organization's schools whose performance is relatively low or not satisfactory and discuss the school's academic performance. If possible, select a school with similar demographics to the targeted Indiana student population described in your application.
  - Be specific about the results on which you base your judgment that performance is unsatisfactory. Include student status, growth, absolute and comparative academic results, as available.
  - Describe the primary causes to which you attribute the school's problems.
  - Explain the specific strategies that you are employing to improve performance.
  - How will you know when performance is satisfactory? What are your expectations for satisfactory performance in terms of performance levels and timing?

This question is not applicable: the applicant does not have multiple other schools and has none offering the same grade levels as the proposed SASB.

4. For all schools operating in the State of Indiana, provide the following as **Attachment 22**: (a) the last three years of audited financial statements for the school; and (b) the most recent internal financial statements including balance sheets and income statements (at least through the end of June 2011) for the organization and any related business entities. Be sure that the school level, ESP/CMO level, and the overall operations are distinctly represented. **NOTE: There is no page limit for this attachment.**  
See Attachment 22.
5. For the organization as a whole and any related business entities, provide the following as **Attachment 23**: (a) the last three years of audited financial statements and management letters; and (b) the most recent internal financial statements including balance sheets and income statements (at least through the end of June 2011). Be sure that the ESP/CMO level and the overall operations are distinctly represented. **NOTE: There is no page limit for this attachment.**  
See Attachment 23.
6. List any contracts with charter schools that have been terminated by either the organization or the school, including the reason(s) for such termination and whether the termination was for "material breach."  
None. CASB is in the process of terminating its agreement with Ball State University for reasons explained in the Prior Application.
7. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization and explain.  
None.
8. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years, and how such deficiencies or violations were resolved.  
None.
9. Identify any current or past litigation, including arbitration proceedings, by school, that has involved the organization or any charter schools it operates. Provide the following as **Attachment 24**: summary of the following information: (a) the demand, (b) any response to the demand, and (c) the results of the arbitration or litigation. **NOTE: Limit attachment to ten (10) pages.**  
See Attachment 24.



## FINAL APPLICATION SUBMISSION REQUIREMENT

As **Attachment 25**, attach one PDF file that contains all application components, including the Proposal Overview and Enrollment Projections Template, the Proposal Narrative, and all required Attachments. This PDF file will be posted on the Indiana Department of Education website as required under Indiana law. Therefore, please be certain that this attachment contains no confidential personal information.

Career Academy of South Bend Application to Education One, LLC (Trine University)  
 Application for Success Academy of South Bend: Attachment List

NUMBER	ATTACHMENT NAME	FORMAT	Page Reference
1	Founding Group Resumes	PDF	7
2	Head of School/Principal Candidate Resume	PDF	8
3	School Administrators' Resumes	PDF	9
4	Governance Documents – 501(c)(3) Letter of Determination, Articles of Incorporation and Bylaws	PDF	9
5	Statement of Assurances	PDF	9
6	Board Member Information	PDF	9
7	Code of Ethics and Conflict of Interest Policies	See bylaws	10
8	Education Service Provider (ESP) Documentation	none	10
9	Organization's Business Plan	none	11
10	Organizational Charts	PDF	13
11	Course Scope and Sequence	PDF	21
12	Academic and Exit Standards	PDF	21
13	School Calendar and Schedule	PDF	21
14	Enrollment Policy	PDF	33
15	Student Discipline Policy	PDF	33
16	Evidence of Support from Community Partners	PDF	37
17	Start-Up Plan	PDF	46
18	Insurance Coverage	PDF	48
19	Budget and Staffing Workbook	Excel	49
20	Budget Narrative	PDF	50
21	Portfolio Summary	PDF	53
22	Indiana School Financials	PDF	54
23	Operator Financials	See 22	54
24	Litigation Documentation	PDF	54
25	Entire Application	PDF	30
	<b>APPENDIX</b>		<b>Page</b>
App 1	SBCSC School Data		3
App 2	Community Engagement		4-5
App 3	Career Academy Network Pay Plan		20
App 4	School Culture: Positive Behavior Support		23-24
	Attachment 1: School Education Agreement		25
App 5	Short Assessment Format		44
		<b>Page Reference</b>	
App 6	Safety Plan		46
App 7	Estimated Renovation Costs		49
App 8	Site Plan		49
App 9	Floor Plan		49

SOUTH BEND  
**CAREER ACADEMY**

**EMERGENCY PROCEDURES**

DIAL 911 FOR: FIRE / AMBULANCE / POLICE

**EVACUATE / RELOCATE**

(UNSAFE BUILDING CONDITION / BOMB / EARTHQUAKE)

**FIRE**

(FIRE / GAS LEAK)

**STORM / TORNADO**

(HIGH WINDS / FUNNEL CLOUD)

**LEVEL 1 LOCKDOWN**

(STUDENT VIOLENCE / MEDICAL EMERGENCY / RABID ANIMAL)

**LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)

- Upon hearing the verbal public address announcement, all students / staff shall leave the building following the “Red Arrow” Procedures found on the posted classroom emergency map or the safest route possible.
- Teacher shall have student roster in hand and also be prepared to report any students who were added to their roster as a result of the emergency situation.
- All occupants shall remain absolutely quiet during evacuation procedure.
- Meet at designated outside safe area. If directed to relocate, the designated relocation facility is \_\_\_\_\_
- Wait for next ACTION or an ALL CLEAR instruction before returning.

## **EVACUATE / RELOCATE**

(UNSAFE BUILDING CONDITION / BOMB / EARTHQUAKE)

## **FIRE**

(FIRE / GAS LEAK)

## **STORM / TORNADO**

(HIGH WINDS / FUNNEL CLOUD)

## **LEVEL 1 LOCKDOWN**

(STUDENT VIOLENCE / MEDICAL EMERGENCY / RABID ANIMAL)

## **LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)

- All students / staff shall exit the building immediately at the sound of the fire alarm following the "Red Arrow" procedures found on the posted classroom emergency map or safest route possible.
- Teacher shall take student roster with them.
- Teacher shall assign a responsible student to be the last one out of the room and direct that individual to shut the door as leaving.
- Teacher shall lead students to outside designated safe area.
- No talking or visiting by students.
- Reassemble at outside designated safe area per classroom emergency map.
- Teacher to take attendance and report to Command Center.
- Wait for next ACTION or an ALL CLEAR instruction. Teacher shall lead students back to classroom when and if directed.

## **FIRE**

(FIRE / GAS LEAK)

## **STORM / TORNADO**

(HIGH WINDS / FUNNEL CLOUD)

## **LEVEL 1 LOCKDOWN**

(STUDENT VIOLENCE / MEDICAL EMERGENCY / RABID ANIMAL)

## **LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)

- Upon hearing the verbal public address announcement, all students / staff shall immediately precede to designated safe areas following the “Blue Arrow” procedures found on the posted emergency map or the safest route possible.
- Teacher shall have student roster with them.
- If leaving the room, Teacher shall assign a responsible student to be the last one out of the room and direct that individual to shut the door as leaving. Door should be closed if staying within the room.
- Teacher shall instruct students to kneel on their knees and cover their heads with interlocked fingers.
- No talking or visiting by students.
- Wait for next ACTION or an ALL CLEAR instruction. Teacher shall lead students back to classroom or resume normal activities only when directed.

## **STORM / TORNADO**

(HIGH WINDS / FUNNEL CLOUD)

## **LEVEL 1 LOCKDOWN**

(STUDENT VIOLENCE / MEDICAL EMERGENCY / RABID ANIMAL)

## **LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)

- Upon hearing the verbal public address announcement, all students shall remain in the classroom where they are or proceed to the nearest classroom if they are walking in the corridor at the time of the announcement. No students are allowed to leave the classroom for any reason.
- Teacher shall have student roster in hand and be prepared to report any students who were pulled into their classroom as a result of the Lockdown.
- Teacher shall verify that door is locked and close blinds.
- Normal classroom activities shall continue.
- Wait for next ACTION or an ALL CLEAR instruction.

## **LEVEL 1 LOCKDOWN**

(STUDENT VIOLENCE / MEDICAL EMERGENCY / RABID ANIMAL)

## **LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)

- Upon hearing the public address verbal announcement, all students shall remain in the classroom where they are or proceed to the nearest classroom if they are walking in the corridor at the time of the announcement. No students are allowed to leave the classroom for any reason.
- Teacher shall have student roster in hand and also be prepared to report any students who were pulled into their classroom as a result of the Lockdown.
- Teacher shall verify that door is locked, close blinds, turn off lights, move students away from window areas and block door with furniture.
- All occupants shall remain absolutely quiet.
- Wait for next ACTION or an ALL CLEAR instruction.

## **LEVEL 2 LOCKDOWN**

(GUNFIRE / INTRUDER / HOSTAGE / EXTREME VIOLENCE)



SASB Application Appendix 7  
Estimated Renovation Costs

3408 Ardmore Trail  
South Bend, Indiana 46614

Panzica Building Corporation  
416 East Monroe Street  
Suite 320  
South Bend, Indiana 46601

**ESTIMATE OF CONCEPTUAL CONSTRUCTION COST**



ESTIMATE UPDATED: 03/02/15

**TOTAL PROJECT DATA:**

Site Contract Limits: 435,600 s.f.+ 10.00 acres

Existing Structure	83,000 s.f.
New Entry Vestibule	6,000 s.f.
New Gymnasium	12,240 s.f.
<b>TOTAL FACILITY UNDER ROOF</b>	<b>101,240 s.f.</b>

Existing Building Perimeter 1,186 l.f.

**SITE DATA:**

Site Area Improved (Less Building Area): 435,600 101,240 334,360 s.f. = 7.68 acres

**PROJECT DESCRIPTION:**

Gross renovation of the existing building including interior demolition of finishes, walls, plumbing fixtures, lighting, mechanical ductwork, and electrical distribution. New interior demising, partition & load bearing walls. New wall and floor finishes. Complete re-roof of existing structure. Build annex to the existing structure for Gymnasium. Build new entry vestibule. New plumbing distribution and fixtures. Partial new HVAC & exhaust. New mechanical equipment. New HVAC controls. New electrical distribution, power, and lighting. General repairs of site concrete, paving, sealcoating. Limited new concrete curbs and sidewalks. Limited landscaping.

**PROJECT SPACE ALLOCATION:**

<b>Total Project Square Footage:</b>	<b>101,240</b>
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EXISTING INTERIOR BUILD-OUT (WEEKS): 27 No. Mos. 7

GYMNASIUM INTERIOR BUILD-OUT (WEEKS): 15 No. Mos. 4

CONSTRUCTION PERIOD (WEEKS):

<b>Total Project:</b>	<b>42</b>	<b>No. Mos. = 11</b>
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DIVISION	DESCRIPTION	QUANTITY	UNIT	UNIT COST	CALCULATED COST	SECTION EXTENSION	PROJECT BUDGET	TOTAL	COST /S.F.
DIV. 1	<b>GENERAL CONDITIONS</b>								
	General Conditions	1	LS	x \$392,819.00	\$392,819		\$392,819	2.76%	\$3.88
	Division Subtotal								
DIV. 2	<b>EXISTING CONDITIONS</b>								
	Masonry Dumpsters (10 CY)	34	EA	x \$185.00	\$6,290				
	Metal Dumpsters (30 CY)	20	EA	x \$185.00	\$3,700				
	General Debris Dumpsters (40 CY)	50	EA	x \$350.00	\$17,500				
	Interior Dock Demolition	1	LS	x \$16,500.00	\$16,500				
	Selective Pre-Cast Demolition (Cutting & Demo)	1,000	LF	x \$68.40	\$68,400				
	Selective Interior Masonry Demolition	1	LS	x \$11,000.00	\$11,000				
	Selective Interior Carpentry Demolition	1	LS	x \$88,930.00	\$88,930				
	Selective Interior Plumbing Demolition	1	LS	x \$2,200.00	\$2,200				
	Selective Interior Electrical Demolition	1	LS	x \$25,500.00	\$25,500				
	Division Subtotal						\$240,020	1.69%	\$2.37
DIV. 3	<b>CONCRETE</b>								
	Interior Concrete Cutting and Slabs	83,000	SF	x \$1.17	\$97,459				
	Vestibule Foundations and Footings (incl. Excav)	320	CY	x \$350.00	\$112,000				
	Gymnasium Foundations and Footings (incl. Excav.)	666	CY	x \$350.00	\$233,100				
	Vestibule Slab	6,000	SF	x \$5.50	\$33,000				
	Gymnasium Slab	12,240	SF	x \$7.00	\$85,680				
	Gymnasium Pre-Cast Panels (32')	14,208	SF	x \$27.00	\$383,616				
	Division Subtotal						\$944,855	6.64%	\$9.33

<b>DIV. 4</b>	<b>MASONRY</b>								
	Masonry	101,240	SF	x	\$0.00	\$0			
	Division Subtotal						\$0	0.00%	\$0.00
<b>DIV. 5</b>	<b>METALS</b>								
	Metals	83,000	SF	x	\$2.53	\$210,056			
	Steel Frames for Pre-Cast Openings (M)	20	ton	x	\$3,250.00	\$65,000			
	Vestibule Joist System (M)	1,500	LF	x	\$22.00	\$33,000			
	Gymnasium Joist System (M)	3,060	LF	x	\$30.00	\$91,800			
	Vestibule Steel Deck (M)	6,000	SF	x	\$3.25	\$19,500			
	Gymnasium Steel Deck (M)	12,240	SF	x	\$3.25	\$39,780			
	Structural Steel Installation	1	LS	x	\$99,632.00	\$99,632			
	Division Subtotal						\$558,768	3.93%	\$5.52
<b>DIV. 6</b>	<b>WOOD &amp; PLASTICS</b>								
	Wood & Plastics	101,240	SF	x	\$11.51	\$1,165,677			
	Division Subtotal						\$1,165,677	8.20%	\$11.51
<b>DIV. 7</b>	<b>THERMAL &amp; MOISTURE PROTECTION</b>								
	Thermal & Moisture Protection	83,000	SF	x	\$0.29	\$23,655			
	Exterior Wall Insulation (Extg.)	21,348	SF	x	\$1.30	\$27,752			
	Reroof Existing Structure	83,000	SF	x	\$7.00	\$581,000			
	Gymnasium Roofing	12,240	SF	x	\$5.50	\$67,320			
	Division Subtotal						\$699,727	4.92%	\$6.91
<b>DIV. 8</b>	<b>WINDOWS, DOORS &amp; HARDWARE</b>								
	Windows, Doors, & Hardware	101,240	SF	x	\$4.21	\$425,876			
	Aluminum Glazing	3,840	SF	x	\$29.00	\$111,360			
	Division Subtotal						\$537,236	3.78%	\$5.31
<b>DIV. 9</b>	<b>FINISHES</b>								
	Finishes	101,240	SF	x	\$6.03	\$610,538			
	New Gymnasium Floor	12,240	SF	x	\$9.50	\$116,280			
	Exterior Painting (Gymnasium)	14,208	SF	x	\$1.65	\$23,443			
	Exterior Painting (Existing)	21,348	SF	x	\$1.65	\$35,224			
	Division Subtotal						\$785,485	5.52%	\$7.76
<b>DIV. 10</b>	<b>SPECIALTIES</b>								
	Specialties	101,240	SF	x	\$0.35	\$35,778			
	Lockers	101,240	SF	x	\$0.99	\$100,278			
	Interior Signage	101,240	SF	x	\$0.18	\$18,714			
	Division Subtotal						\$154,770	1.09%	\$1.53
<b>DIV. 12</b>	<b>FURNISHINGS &amp; EQUIPMENT</b>								
	General Equipment	101,240	SF	x	\$0.73	\$73,865			
	Kitchen Equipment	101,240	SF	x	\$2.93	\$296,812			
	Gymnasium Equipment	1	LS		\$87,500.00	\$87,500			
	Furnishings	101,240	SF	x	\$6.04	\$611,491			
	Division Subtotal						\$1,069,667	7.52%	\$10.57
<b>DIV. 14</b>	<b>CONVEYING EQUIPMENT</b>								
	Conveying Equipment	1	LS	x	\$29,640.00	\$29,640			
	Division Subtotal						\$29,640	0.21%	\$0.29
<b>DIV. 22</b>	<b>FIRE SUPPRESSION</b>								
	Fire Suppression System	101,240	SF	x	\$2.10	\$212,361			
	Division Subtotal						\$212,361	1.49%	\$2.10
<b>DIV. 22</b>	<b>PLUMBING</b>								
	Plumbing System	101,240	SF	x	\$2.21	\$223,902			
	Disable Gas/Water & Verify Existing Conditions	1	LS	x	\$2,200.00	\$2,200			
	Division Subtotal						\$226,102	1.59%	\$2.23

<b>DIV. 23</b>	<b>MECHANICAL</b>								
	Mechanical System	101,240	SF	x	\$13.62	\$1,379,193			
	New Mechanical Equipment	190	tons	x	\$1,850.00	\$351,500			
	<b>Division Subtotal</b>						<b>\$1,730,693</b>	<b>12.17%</b>	<b>\$17.09</b>
<b>DIV. 26</b>	<b>ELECTRICAL</b>								
	Electrical System	101,240	SF	x	\$9.88	\$1,000,636			
	Temporary Construction Lighting	1	LS	x	\$6,000.00	\$6,000			
	<b>Division Subtotal</b>						<b>\$1,006,636</b>	<b>7.08%</b>	<b>\$9.94</b>
<b>DIV. 27</b>	<b>COMMUNICATIONS</b>								
	Fire Alarm Systems	101,240	SF	x	\$0.52	\$53,090			
	IT Systems	101,240	SF	x	\$8.19	\$829,640			
	RFID System	101,240	SF	x	\$0.50	\$50,620			
	<b>Division Subtotal</b>						<b>\$933,350</b>	<b>6.56%</b>	<b>\$9.22</b>
<b>DIV 31/32</b>	<b>SITWORK</b>								
	General Site Work	334,360	SF	x	\$4.75	\$1,588,210			
	Playground Equipment	1	LS	x	\$180,000.00	\$180,000			
	<b>Division Subtotal</b>						<b>\$1,768,210</b>	<b>12.43%</b>	<b>\$17.47</b>
<b>Subtotal Direct Project Costs</b>					Parity Check:	12,456,018	<b>\$12,456,018</b>	<b>87.60%</b>	<b>\$123.03</b>
	<b>CONTINGENCY</b>								
	Construction Contingency	3.00%		x	12,456,018	373,681			
	<b>Division Subtotal</b>						<b>\$373,681</b>	<b>2.63%</b>	<b>\$1.58</b>
	<b>PROFESSIONAL FEES</b>								
	Construction Management Project Fee Multiplier	6.50%		x	12,829,699	833,930			
	<b>Division Subtotal</b>						<b>\$833,930</b>	<b>5.86%</b>	<b>\$3.80</b>
	Schematic & Design Development Phase Fee	1	ls	x	75,000	75,000			
	Architectural/Engineering Project Fee Multiplier	3.75%		x	12,829,699	481,114			
	<b>Division Subtotal</b>						<b>\$556,114</b>	<b>3.91%</b>	<b>\$2.63</b>
<b>TOTAL ESTIMATED CONCEPTUAL COST</b>							<b>\$14,219,743</b>	<b>100%</b>	<b>\$131.04</b>



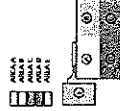


PanZico  
Construction

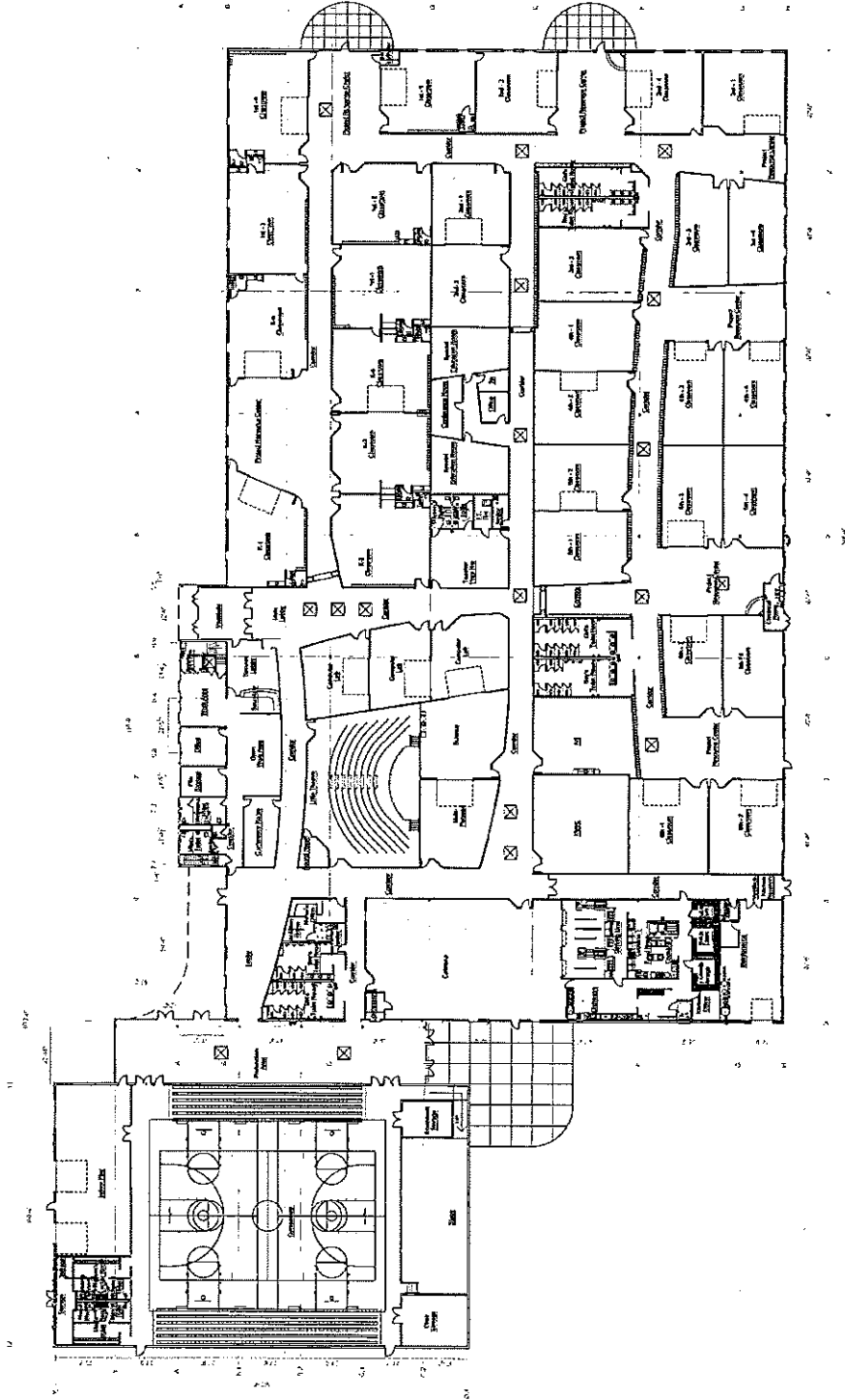
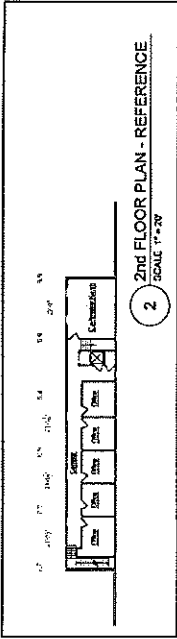
# SASB Application Appendix 9: Floor Plan

This drawing is the property of  
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**PANZICO**  
CONSTRUCTION, LLC  
10000 W. 10th Avenue, Suite 100  
Denver, CO 80202  
303.751.1000



A100



1 DIMENSIONED FLOOR PLAN - REFERENCE  
SCALE 1/8" = 1'-0"

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 1: Resumes of Founding Group

1	Lawrence H Garatoni	President/Board Chair/Treasurer
2	Vivian Sallie	Director/Secretary
3	Tracy Graham	Director
4	Thomas Coley	Director
5	Larry Davis	Director
6	Jinny Longbrake	Director
7	Suzanne Wiwi	Director
8	Paul Schlottman	Superintendent
9	Charles Loeser	Assistant Secretary/Attorney

**RESUME**  
**Lawrence (Larry) Garatoni**  
**4100 Edison Lakes Parkway, Suite 260**  
**Mishawaka, IN 46545**

- Personal and Education
  - Married for 50 years with four children and 13 grandchildren.
  - BSCE 1961 Purdue University and completed Owners/President Program of Harvard Business School.
  - Rank of Captain in Army Reserve.
  
- HQ Investments (2007-Present)
  - Manage investments in public equities, private equities, hedge funds, venture capital and angel investing.
  - K-12 education focused philanthropic activities.
  - Manage Garatoni Family Foundation.
  
- Software and Internet sales companies (1994-2007)
  - As CEO of Achieve Healthcare Technology, acquired several software companies and led development of a leading edge product.
  - As CEO of FurnitureFind.com and Winesource.com, led development of two on-line retailing companies.
  - Companies sold in 2007.
  
- Health Quest Group (1969-1994)

During this time, founded and operated as CEO several companies. All these companies were sold in the 1993-1994 time period.

  - Health Quest Corporation – managed long term care, assisted living and independent living retirement facilities.
  - Health Quest Development Corporation – developed, designed and constructed 34 major real estate developments containing 4100 long term care beds, 520 assisted living units and 300 independent living retirement apartments.
  - Achievement Rehab Corporation – provided contract therapy services to LTC facilities in six states.
  - Long Term Care Pharmaceutical Services Corporation – provided institutional pharmacy services to 22,000 LTC beds and 1,100 correctional facility inmates. Had six locations in three states.
  - Health Quest Infusion Therapy Corporation – provided home infusion therapy services and patient support from three locations.

Also started and later ceased operation of a physician practice management company, and a home health company.

- Nursing Home Partnership (1964-1969)

During this time, built and operated one LTC facility with a partner. Later bought the partner's interests.

## Vivian G. Sallie

Vivian Sallie is President of Sallie and Associates LLC, in Granger, Indiana. She is a Parliamentarian, certified by the American Institute of Parliamentarians. Vivian assists nonprofit organizations in developing their bylaws and other governing documents. She also presides as a governance consultant with government agencies.

### Employment:

Vivian has over 25 years experience in marketing, strategic planning, fundraising and business development in both the private and public sector. Her professional career includes International Harvester Co. (Navistar) where she served as the Southern Region Communications Director (1974-1981); Senior Marketing Director, Hospital Division with Humana Inc., a health care corporation headquartered in Louisville, KY. (1981-1990). While in Louisville, she was part owner of three Paradis © retail gift shops located in the Kentuckiana Regional Airport and later sold them to HMS Host after relocating to South Bend. In South Bend she served as Director of the Minority and Women Business Development Office, an affiliate of the Chamber of Commerce of St. Joseph County (1992-2007). During those years she taught a business development class at Saint Mary's College. She also created a youth development program called YEOP (Youth Economic Opportunity Program) which assisted at-risk youth in learning life-skills, finding employment, and volunteerism. In 2007 she was named Vice President of Development for United Way of St. Joseph County and lead campaigns that exceeded \$3 million for each of the next two years. In 2008 she accepted the position of Vice President and Director of Development for WNIT Public Television during that organization's \$6.5 million capital campaign and relocation to South Bend, IN. In 2012 she retired from WNIT to care for a terminally ill parent.

### Community Service:

Vivian's community involvement includes service on the boards of Beacon Health System (Nominating and Governance Committee Chair); Association of Fundraising Professionals (Chapter President); Northern Indiana Historical Society (Governance Chair); South Bend Career Academy, Industrial Revolving Fund of St. Joseph County, and South Bend Rotary Club (Programs Chair). For over 18 years Vivian has hosted, "Michiana Talks" a local community affairs program on WUBU-FM radio station serving the northern Indiana and Southwest Michigan listening audience (1994-2012).

### Education:

Vivian is a native of Illinois and a graduate of Southern Illinois University where she earned a B.S. degree in Sociology. She has also completed continuing education classes at Bellarmine College, Louisville, KY and Indiana University South Bend. She is a certified Steven Covey facilitator and she has also attended numerous leadership development and innovation workshops.

### Family and Faith:

Vivian is married to Arnold Sallie and together they are parents to five children and nine grandchildren. She is a member of Greater Saint John Missionary Baptist Church and Women's Bible Study Fellowship (BSF).



Tracy Graham  
Director/Finance Committee  
1400 East Angela Drive, Suite 131  
South Bend, IN 46617  
574-485-2146  
tgraham@graham-allen.com

Founder and Managing Principal of Graham Allen Partners, a private holding company focused on the incubation of early-stage, high-growth technology businesses

Mr. Graham is the founder and Managing Principal of Graham Allen Partners. Graham Allen Partners is a private holding company focused on the incubation of early-stage, high-growth technology businesses. Mr. Graham has 15 years of executive level experience in the technology industry and has led more than \$80 million in technology related acquisitions and divestitures. Graham Allen Partners utilizes this extensive experience to create value in their subsidiaries, while developing innovative business models that create local partnerships that positively contribute to the community and add value for their investors.

Prior to founding Graham Allen Partners, Mr. Graham co-founded GramTel, Inc., a managed data center provider, in partnership with The Jordan Company, a private equity firm headquartered in New York. As President of GramTel, he was responsible for the company's strategic direction as well as aligning all internal and external resources to gain market share in the small and mid-sized business market. He led the company to become the largest provider of managed data center services in the state of Indiana and the largest privately held provider in the Midwest. In 2007, he completed the successful sale of GramTel to Cincinnati Bell, Inc., a publicly traded telecommunications company.

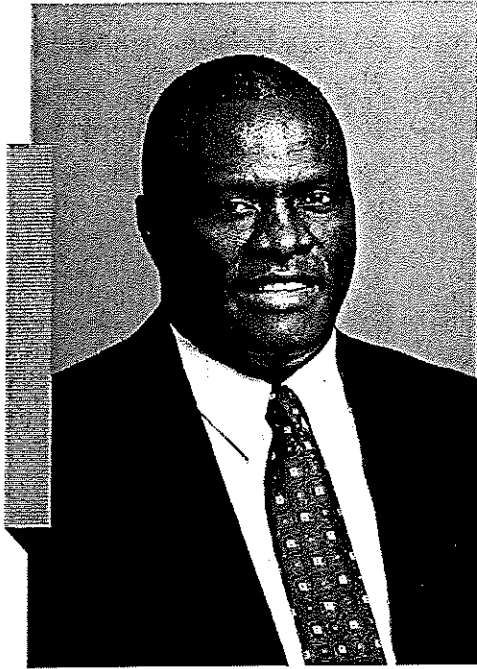
After selling GramTel, he joined the Cincinnati Bell team and over a two year period worked with the company to build its managed data center business with a focus on the small and mid-sized business market.

Prior to founding GramTel, he founded Internet Services Management Group, Inc ("ISMG"), which he led to become the second largest privately held ISP in the United States, acquiring and integrating 23 companies. With its focus on a secondary market customer niche, ISMG thrived well below the radar of the giant telecom providers. His ability to execute a business strategy that embraces secondary markets propelled the company to a leadership position in the field.

Mr. Graham has a long history of community service, currently serving on the boards of Davenport University (Chairman), Memorial Hospital, WNIT (a Public Broadcasting Television Station), and The Center for the Homeless, as well as the Career Academy of South Bend.

Mr. Graham earned a Bachelor of Arts degree from the University of Notre Dame and attended the Indiana University Graduate School of Education.

Tracy as member of mayoral transition team <http://www.freshstartsouthbend.com/transition-team/tracy-graham>



**THOMAS G. COLEY, PH.D.**

*Chancellor*

---

Ivy Tech Community College  
North Central and Northwest regions

Thomas Coley joined Ivy Tech in 2011 and is the chancellor of Ivy Tech's North Central and Northwest regions, which include seven campuses in East Chicago, Gary, Goshen, Michigan City, South Bend, Valparaiso, and Warsaw.

Prior to joining Ivy Tech, Dr. Coley served as president of Scott Community College in Scott County, Iowa, part of the East Iowa Community College District. In addition to his role as president of Scott Community College, Dr. Coley also served as vice chancellor of Instruction for the East Iowa Community College District. He also served as vice chancellor of Technology and Communications Systems for the District from 2005 – 2008.

Prior to his roles at Scott Community College, Dr. Coley served as vice president of Instruction and Student Services at Black Hawk College in Moline, Illinois from 2000 – 2005. In addition, Dr. Coley served as assistant vice president for Academic and Student Affairs at Cuyahoga Community College in Cleveland, Ohio, from 1997 – 2000. Prior to that, he served as assistant vice chancellor of Academic Affairs for the Oregon State System of Higher Education; executive assistant to the president at California State University-Fullerton; and assistant provost of the Division of Human and College Resources at University of Maryland-College Park.

Dr. Coley earned his doctoral degree in Education Administration and his master's degree in Political Science from the University of Wisconsin. He earned his bachelor's degree in Political Science from Moorhead State University in Minnesota.

Dr. Coley is a member of the Rotary Club of South Bend and sits on the boards of the Economic Development Corporation of Elkhart County, the Michiana Family YMCA, the Minority and Women Business Enterprise Diversity Board, the Northern Indiana Workforce Board, WNIT Center for Public Media, and Ronald McDonald House Charities of Michiana.





Daman  
Products  
Company, Inc.

1811 N. Home Street  
Mishawaka, IN 46545-7267  
North America Ph: 800.959.7841  
Fax: 800.241.7664  
International Ph: 574.259.7841  
Fax: 574.259.7665  
Internet: <http://www.damanifolds.com>

## LARRY M. DAVIS

Davis has played a prominent role in his manufacturing company's overall performance as the lead promoter of innovative continuous improvement principles to achieve focused alignment on exceeding his customer's expectations while achieving astonishing results. He is a strong proponent of the necessary positive culture changes required to support elimination of waste in traditional operational methods. He is also deeply active in K-12 education reform in his community.

Daman received the Great Lakes Manufacturing Excellence Award in 2009. Davis was honored as Indiana's Small Business Person of the Year 2005. Daman was named as the recipient of the South Bend Alumni Association's 2011 Corporate Contribution to Education Award.

Davis is active in local and national community and trade organizations, primarily focused on education initiatives.

Addresses:

Daman Products Co., Inc.  
1811 N Home Street  
Mishawaka, IN 46545

Larry Davis  
52740 Ash Road  
Granger, IN 46530

Sincerely,

**Larry Davis | President**  
**Daman Products Company, Inc.**

800.959.7841 (Office)  
574.532.9009 (Cell)  
[larryd@daman.com](mailto:larryd@daman.com)

[www.daman.com](http://www.daman.com)  
[www.twitter.com/DamanProductsCo](http://www.twitter.com/DamanProductsCo)

Jinny Longbrake  
Beacon Health System  
100 East Wayne St  
South Bend, IN 46601  
574-647-3606 (Phone)  
[Jlongbrake@BeaconHealthSystem.org](mailto:Jlongbrake@BeaconHealthSystem.org)

Jinny Longbrake is the Director of Associate Relations, at Beacon Health System, formally Memorial Health System. She has been employed at Beacon for 22 years in the Human Resources department. Jinny earned her Bachelor's degree in Management Administration and Industrial & Personal Relations from Indiana University. She is a native to South Bend, is married to Luther, has two grown children and 3 beautiful granddaughters. Jinny currently serves as the Chair, Indiana Workforce Board Association (INWBA) and Chair, Northern Indiana Workforce Board.

**Suzanne Wiwi**  
**1240 Longfellow Ave.**  
**South Bend, IN 46615**  
**574-234-0451**  
wiwi@stjosephgradeschool.com

## **CERTIFICATION**

- Elementary Education (Grade K-6 – Non-Departmental 7,8) – Life License
- Masters of Science - Elementary Education
- Endorsement – Reading (Grade K-8)
- Administration: Elementary Education Indiana University/South Bend

## **EXPERIENCE**

8/89-Present

- Principal
- Saint Joseph Grade School
- Kindergarten-Grade 8

8/84-6/89

- Second Grade Teacher
- Saint Joseph Grade School

8/88-8/89

- Assistant Principal
- Saint Joseph Grade School

8/77-6/83

- Kindergarten Teacher – 3 years
- Second Grade Teacher – 4 years
- LaPaz Elementary School

8/76-12/77

- Title I Teacher
- LaPaz Elementary School

8/71-6/76

- Second Grade Teacher – 4 years
- Third Grade Teacher – 1 year

- First Grade Teacher – 1 year

## **EDUCATION**

### **Ball State University**

- Bachelor of Science Degree February 1971

### **Indiana University South Bend**

- Masters of Science May 1974
- Reading Endorsement
- Indiana University South Bend
- Administration: Elementary Education May 1992

## **Organizations/Memberships - present**

- School Board – Career Academy
- Christ Child Society- South Bend Chapter
- National Council Teachers of Mathematics
- ASCD/American Society of Curriculum Development
- National Council Teachers of English
- National Middle School Association
- NCA CASI Advanc-Ed – trained chair for accreditation teams

## **Honors**

- Diocese of Fort Wayne/South Bend: Light of Learning Awardee : 1996
- YMCA – Educational Women of the Year
- Nominee: NCEA Principal of the Year

## PAUL SCHLOTTMAN, Ed. S.

1504 Del Vista • Valparaiso, Indiana 46385 • Home (219) 465-0077 • Cell (219) 263-3458  
[pmschlottman@comcast.net](mailto:pmschlottman@comcast.net)

### PROFESSIONAL OBJECTIVE

To serve as an educational leader who exemplifies character, integrity, effective practice and transformational decision-making. I will foster an inclusive attitude that respects the diversity of our community. I will ensure effective teaching, a guaranteed curriculum, efficient monitoring and capable leadership so all students will achieve their fullest potential and become responsible citizens.

### EDUCATION and CERTIFICATION

Oakland University	Rochester, Michigan	2004 - 2006
Education Specialist Degree	K-12 Educational Administration	
Wayne State University	Detroit, Michigan	1998 - 2001
Master of Education Degree	Educational Leadership	
Western Michigan University	Kalamazoo, MI	1984 - 1988
Bachelor of Science	Secondary Education	

#### Indiana Licenses

License Number: 10027344	SPN No: 10251642	Highest Degree Earned: Specialist
Superintendent	Basis: REPA	Grades: Pre-K to 12 Expires: 2/3/2017
Director of Curriculum and Instruction	Basis: REPA	Grades: Pre-K to 12 Expires: 2/3/2017
Building Level Administrator	Basis: 2002	Grades: Pre-K to 12 Expires: 6/28/2020

#### Michigan License

Administrative Certificate Post-Masters Certificate Oakland University Certificate: CC-XUT670284320

### PROFESSIONAL EMPLOYMENT

Principal, Boone Grove Middle School Porter Township School Corporation	Boone Grove, Indiana	2006 - Present (school enrollment: 425)
--	----------------------	--

- Consistently earned exemplary progress with annual improvement rates up to 5.8% - "A" rating
- Completed two AdvancEd Quality Assurance Reviews and Accreditation with no required actions
- Assisted in the development and implementation of IDOE approved Online Instructional days
- Developed nationally recognized Challenge Day, Student Council and Principal's Council
- Assisted in the development of our 1-to-1 Instructional technology plan
- Dramatically improved school climate, culture, diversity acceptance and empathy toward others
- Created a student-centered professional learning community (DeFour)
- Trained staff to use action research and data to make instructional and curricular decisions
- Created transformational leadership team to promote transparent and shared decision-making
- Decreased discipline referrals 53% with staff development Positive Discipline (Nelson) and PBIS
- Implemented comprehensive academic remediation and RTI intervention programs
- Implemented new instructional strategies: 6+1 Writing Traits (Culham), and Working on the Work (Schlecty), Differentiated Instruction (Allen, Tomlinson), Understanding by Design (Wiggins, McTighe), and Thinking Maps, Career Exploration and Service Learning
- Assessments: NWEA, ACT Engage, Acuity, in depth ISTEP data analysis and A+ Learning Link
- Developed scope and sequence curriculum and instruction strategies to ensure a guaranteed curriculum mastery of academic standards by all students

**Assistant Principal, Lake Shore High School****2003 – 2006**

Lake Shore Public Schools St. Clair Shores, MI (urban suburb of Detroit) (student enrollment: 1147)

- Directed all Career and Technical Education programs, budgets and transportation
  - Successfully completed two Federal Perkins Career Technical grants and audits
  - Developed dual enrollment, virtual high school, distance learning, off campus programs
  - Developed university articulation agreements, business partnerships and community outreach
  - South East Macomb Career Tech Consortium representative (class scheduling, regional coordination, student transportation, and south-county liaison)
  - Developed Michigan Model High School Reform Plan and 8<sup>th</sup> - 9<sup>th</sup> grade transitions
  - Developed and implemented district community service and service learning programs
  - Initiated development of International Baccalaureate and Advance Placement curriculum
  - Attendance and pupil accounting (increased daily attendance by 6% to over 97% average daily)
  - Founded transformational leadership group to promote transparent and shared decision-making
  - Implemented Thematically Integrated Instructional Curriculum to increase student engagement
  - Action research: attendance, school climate, student engagement, and professional development
  - Assessed and implemented school climate surveys and improvement strategies
  - Coordinated staff development and evaluations (evaluated 60% of total staff)
  - Student discipline, school safety and school security (decreased disciplinary referrals by 22%)
  - Developed instructional curriculum and scheduling in all curricular areas
  - Supervised state testing and increased participation from 88% to 99% always making AYP
  - Organized and chaired committees: Student Code of Conduct, Enrollment and Accountability, Community Service, Service Learning, Staff and Public Relations, and School Improvement
- 

**K-12 Visual and Performing Arts Coordinator****1995 – 2003**

Ferndale Public Schools Ferndale, MI (urban suburb of Detroit)

(student enrollment: 4000)

- Developed one of the finest and most comprehensive fine arts programs in the Mid-West
  - Managed budgets, inventories, capital projects and RFPs and negotiated vendor contracts
  - Assessed, developed and implemented curriculum for all Arts areas
  - Developed and implemented K-12 Master Schedules for all schools
  - Administrated department of twenty-one visual, performing and dramatic arts teachers
  - Founder - Arts Across the Curriculum Program integrating arts with academic disciplines
  - Co-authored and administered several funded grants
  - Posted, screened, interviewed, negotiated, and recommended for hire fourteen teachers
  - Developed staff development and school improvement plans and evaluations
  - Administered monthly department meetings and professional development in-services
  - District committees: Ferndale Arts Council, Bond, Facility Design and Implementation, Ferndale Education Association, Program Development, Restructuring, Student and Staff Advisory
- 

**Director of Bands****1991 – 2003**

Ferndale Public Schools

Ferndale, MI

(student enrollment: 4000)

- Increased and maintained student participation up to 66% of total student population
- Coordinated budgets, accounts, purchasing, fundraising, grant writing and capital purchases
- Earned consistent superior ratings at State and District M.S.B.O.A Band Festivals
- Directed six performing ensembles: competitive concert bands, jazz bands and marching bands



# PAUL SCHLOTTMAN, Ed. S.

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Porter Township School Corporation	Boone Grove, Indiana (school enrollment: 425)

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- Assessments: NWEA, ACT Engage, Acuity, in depth ISTEP data analysis and A+ Learning Link
- Developed scope and sequence curriculum and instruction strategies to ensure a guaranteed curriculum mastery of academic standards by all students

## **SPECIALIZED TRAINING AND EXPERIENCE**

---

2013	Indiana School Safety Academy and National Incident Management Certification	
2012	Indiana RISE Teacher Evaluation Training	Union Township, IN
2012	Indiana Legislative and Lobbyist Training	Indianapolis, IN
2012	ACT Engage Assessment Training	Boone Grove, IN
2011, 2006	AdvanEd (NCA) Quality Assurance Review	Boone Grove, IN
2011	AdvancEd Preparing for your QAR Training	Middleberry, IN
2011	CPI School Safety, De-escalation and Restraint Training	Valparaiso, IN
2011	Leadership Northwest Indiana Education Reform Panelist	Valparaiso, IN
2010	Indiana Aspiring Superintendent Seminar	Indianapolis, IN
2009-2011	Response to Intervention (RTI) Training	Hammond, IN
2008	Assoc. for Supervision and Curriculum Dvlp. Nat'l Conference	New Orleans, LA
2006	Presenter - Model High School Reform	Michigan Assoc. of Sec. School Principals - Conference
2006	Presenter - Model High School Reform	Michigan Acad. of Sciences, Arts and Letters - Conference
2005-2006	Macomb Intermediate School District (MISD) High School Reform Steering Committee	
2005-2006	Royal Oak Curriculum Advisory Committee	Royal Oak, MI
2005-2006	Michigan Community Service and Service Learning Program	Macomb Inter. School Dist.
2005	United States Secret Service School Safety Training	Macomb Inter. School Dist.
2005	Creating Small Learning Communities Training (DeFour)	Macomb Inter. School Dist.
2005	Restorative Practices with Positive Discipline Training	Oakland Schools
2005	Disciplining Students with Disabilities Legal Training	Macomb Inter. School Dist.
2005	Redefining Michigan's High School: Beginning the Process	MDOE, Lansing, MI
2005	MDOE Focus Panel - Teacher Certification Standards	MDOE, Lansing, MI
2005	Rethinking Michigan's High Schools - Willard Daggett	Macomb Inter. School Dist
2004	MDOE Teacher Certification Administrative Advisory Committee	Lansing, MI
2004-2006	Best Practice Master Scheduling Training - Pearson	Macomb Inter. School Dist.
2004-2006	Career Development and Career Academies Develop. Training	Macomb Inter. School Dist.
2004-2006	Pupil Accounting Training	Macomb Inter. School Dist.
2004-2006	Career Cruising Training	Macomb Inter. School Dist.
2004	Career Technical Education Federal Program Audit	Macomb Inter. School Dist.
2002-2006	School Bully-Proofing Training	Ferndale, MI
2001	Author - Michigan Academic Standards - MI CLIMB	MDOE, Lansing, MI
1997-2000	President of Oakland Schools Arts Council	Oakland Schools
1998-2001	Students in the Middle Conferences	MDOE, Lansing, MI
1998-2000	Multiple Intelligence Training by Dr. Howard Gardner	Detroit, MI
2000	Differentiated Instruction Training	Ferndale, MI

## **PROFESSIONAL MEMBERSHIPS**

---

2012 - Present	Indiana School Safety Academy and National Incident Management Certification(NIMS)
2013 - Present	Board of Directors - Porter County Youth Service Bureau
2012 - Present	Board of Directors - Positive Approach to Teen Health - PATH
2012 - Present	Leadership Northwest Indiana - Class 31 frequent guest and Lake Shore News speaker
2006 - Present	National Assoc. of School Principals and Indiana Association of School Principals
2006 - Present	Valparaiso University Professional Educators Partnership
2003 - 2006	Michigan Association of Secondary School Principals
1998 - Present	Association for Supervision and Curriculum Development

## PROFESSIONAL REFERENCES

---

Mr. Keith Kirkpatrick  
Executive Director  
Leadership Northwest Indiana  
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[keith@leadershipnwi.org](mailto:keith@leadershipnwi.org)

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Valparaiso, IN 46383-4251  
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---

Mr. Chadwick Addie  
Middle School Education Manager  
South Bend Career Academy  
3801 Crescent Circle  
South Bend, IN 46628  
(574) 299-9800  
[caddie@sbcafn.org](mailto:caddie@sbcafn.org)

Home:  
4238 West Johnson Road  
LaPorte, IN 46350  
Home: (219) 324-9235  
Cell: (219) 393-4609

---

Mr. Tom Hines  
Assistant Principal (retired)  
Thomas Jefferson Middle School  
Valparaiso Community Schools  
Porter Township School Corporation  
Expulsion Hearing Officer

Home:  
325 Village Square  
Chesterton, IN 46304  
Home: (219) 787-8786 Cell: (219) 405-2817

---

Mrs. Paula Keller  
Teacher (Retired)  
Boone Grove Middle School

Home:  
278 S 300 W  
Valparaiso, IN 46385  
(219) 476-1853

---

Mrs. Carol Schultz  
Teacher (Retired)  
Boone Grove Middle School

Home:  
1750 Byfield Parkway  
Valparaiso, IN 46385  
Home: (219) 462-2264

---

Mrs. Betty Sands  
Principal (Retired)  
Lake Shore High School

Home:  
21258 Lilac Lane  
Clinton Twp, MI 48037  
Home: (586)231-0412  
Cell: (586)854-4566

---

[bgsands@comcast.net](mailto:bgsands@comcast.net)

---

Mr. Chad Roggow  
Teacher  
Boone Grove Middle School  
325 W. 550 S.  
Boone Grove, IN 46302  
(219)464-4828  
[chad.roggow@ptsc.k12.in.us](mailto:chad.roggow@ptsc.k12.in.us)

Home:  
2606 Estero Pkwy  
Valparaiso, IN 46383  
Cell: (219)252-0315

## SPECIALIZED TRAINING AND EXPERIENCE

---

2013	Indiana School Safety Academy and National Incident Management Certification	
2012	Indiana RISE Teacher Evaluation Training	Union Township, IN
2012	Indiana Legislative and Lobbyist Training	Indianapolis, IN
2012	ACT Engage Assessment Training	Boone Grove, IN
2011, 2006	AdvanEd (NCA) Quality Assurance Review	Boone Grove, IN
2011	AdvancEd Preparing for your QAR Training	Middleberry, IN
2011	CPI School Safety, De-escalation and Restraint Training	Valparaiso, IN
2011	Leadership Northwest Indiana Education Reform Panelist	Valparaiso, IN
2010	Indiana Aspiring Superintendent Seminar	Indianapolis, IN
2009-2011	Response to Intervention (RTI) Training	Hammond, IN
2008	Assoc. for Supervision and Curriculum Dvlp. Nat'l Conference	New Orleans, LA
2006	Presenter - Model High School Reform	Michigan Assoc. of Sec. School Principals - Conference
2006	Presenter - Model High School Reform	Michigan Acad. of Sciences, Arts and Letters - Conference
2005-2006	Macomb Intermediate School District (MISD) High School Reform Steering Committee	
2005-2006	Royal Oak Curriculum Advisory Committee	Royal Oak, MI
2005-2006	Michigan Community Service and Service Learning Program	Macomb Inter. School Dist.
2005	United States Secret Service School Safety Training	Macomb Inter. School Dist.
2005	Creating Small Learning Communities Training (DeFour)	Macomb Inter. School Dist.
2005	Restorative Practices with Positive Discipline Training	Oakland Schools
2005	Disciplining Students with Disabilities Legal Training	Macomb Inter. School Dist.
2005	Redefining Michigan's High School: Beginning the Process	MDOE, Lansing, MI
2005	MDOE Focus Panel - Teacher Certification Standards	MDOE, Lansing, MI
2005	Rethinking Michigan's High Schools - Willard Daggett	Macomb Inter. School Dist.
2004	MDOE Teacher Certification Administrative Advisory Committee	Lansing, MI
2004-2006	Best Practice Master Scheduling Training - Pearson	Macomb Inter. School Dist.
2004-2006	Career Development and Career Academies Develop. Training	Macomb Inter. School Dist.
2004-2006	Pupil Accounting Training	Macomb Inter. School Dist.
2004-2006	Career Cruising Training	Macomb Inter. School Dist.
2004	Career Technical Education Federal Program Audit	Macomb Inter. School Dist.
2002-2006	School Bully-Proofing Training	Ferndale, MI
2001	Author - Michigan Academic Standards - MI CLIMB	MDOE, Lansing, MI
1997-2000	President of Oakland Schools Arts Council	Oakland Schools
1998-2001	Students in the Middle Conferences	MDOE, Lansing, MI
1998-2000	Multiple Intelligence Training by Dr. Howard Gardner	Detroit, MI
2000	Differentiated Instruction Training	Ferndale, MI

## PROFESSIONAL MEMBERSHIPS

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2012 - Present	Indiana School Safety Academy and National Incident Management Certification(NIMS)
2013 - Present	Board of Directors - Porter County Youth Service Bureau
2012 - Present	Board of Directors - Positive Approach to Teen Health - PATH
2012 - Present	Leadership Northwest Indiana - Class 31 frequent guest and Lake Shore News speaker
2006 - Present	National Assoc. of School Principals and Indiana Association of School Principals
2006 - Present	Valparaiso University Professional Educators Partnership
2003 - 2006	Michigan Association of Secondary School Principals
1998 - Present	Association for Supervision and Curriculum Development

**Charles M. Loeser**

Office: 4100 Edison Lakes Pkwy, Suite 260. • Mishawaka, IN 46545 • (574) 271-5145, ext. 218  
• charles.loeser@hqinvestments.com

**Education:** Michigan State University - B.A. in Political Science, 1974  
Harvard Law School - J.D., 1977

Employed by Health Quest Group (Larry Garatoni) since 1983, General Counsel since 1987.  
Counsel for Career Academy of South Bend, Inc. since its inception in July 2010.

**1994-2007 Achieve Healthcare Information Systems/Achieve Healthcare Technologies**  
General Counsel

Corporate attorney for Minneapolis-based provider of software and related services to the long term care industry, serving approximately 3,000 facilities nationwide with comprehensive systems for the financial and clinical operations of nursing homes, assisted living facilities, and related facilities.

- Preparation of standard forms and negotiated exceptions for all client contracts
- Agreements for acquisition of software-related companies
- Agreements for acquisition of licenses for resale of third party software/services
- Partnerships/joint ventures/service agreements
- Employment law
- Supervise litigation/arbitration

**1983-2015 Health Quest Group, South Bend, Indiana**  
General Counsel (1987-2015), Assistant G.C. (1983-1987)

Corporate attorney for privately-held organization which as of 1983 was operator/developer of nursing homes, assisted living facilities, and retirement housing facilities in Indiana, Florida, & Illinois (30+ facilities), moved into operation of pharmacies (8 branches, serving 22,000+ nursing home residents), rehabilitation therapy (150+ therapists), home health care, and physician practice management. During 1990's divested, sold pharmacy, therapy and home health businesses, leased/sold facilities; acquired software company, and began venture capital investments. In 2007 sold software company & other operating companies. Now involved as angel investor focusing on early-stage Indiana (especially Michiana) based companies.

- Represented company as buyer, seller, lessor & lessee in 50+ sale/lease transactions
- Represented company as borrower in 50+ financing/refinancing transactions, including construction loans, municipal bond-based financing, HUD/FHA financing, multiple-bank credit-enhanced transactions
- Represented company in regulatory, litigation, and employment matters

**1994-2015 General Counsel for SLCM LLC**  
Represented developer (and until 2004 operator) of assisted living facilities and retirement housing facilities) in real estate acquisitions, construction contracts, financing, customer & employment matters

**1977-1983 Bonahoom, Chapman, McNellis & Michaels, Fort Wayne, IN**  
Associate attorney with concentration in real estate and litigation

**Bar Admission:** Indiana (1978)

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 2: Resume of Proposed School Principal

Resume of Dean L. Fecher

## **Dean L. Fecher**

2714 Oak Leaf Cove • South Bend, IN 46628 • (574) 276-2630 • deanfecher@gmail.com

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### **LICENSURE**

- Administration License, State of Indiana
- General Elementary License, State of Indiana

### **OBJECTIVE**

Obtain a position as a principal of Heroes Academy utilizing knowledge and skills gained from 11 years of Administrative experience and 23 years of educational experience

### **EDUCATIONAL BACKGROUND**

- Educational Administration Curriculum, May 2004 *Indiana University-South Bend*
- Masters Degree: Education, 2000 *Indiana University-South Bend, South Bend IN*
- Bachelors Degree: Education, 1992 *Purdue University, West Lafayette IN*
- Associates Degree: Business, 1988 *Holy Cross Junior College, South Bend IN*
- High School Diploma: 1986 *New Prairie High School, New Carlisle IN*

### **RELATED ADMINISTRATIVE EXPERIENCE**

**Principal, Beiger Elementary** July 2013 - Present

**Principal, Liberty Elementary** January 2009-July 2013

**Literacy Coach Battell Elementary** August 2008 – December 2008

**Principal, Summer School Program** School City of Mishawaka, Summer 2007 and 2008

**Administrative Building Professional** LaSalle Elem., School City of Mishawaka, 2003-2008

- Administrative backup for principal and administrative intern throughout the academic calendar year as needed

**Administrative Intern** Asst. Principal, LaSalle Elem., School City of Mishawaka, 1999-2003

- Schedule coordination with staff of 70
- Track and maintain attendance records, enrollment of 500+
- Administer student disciplinary procedures through documentation & parental contact
- Assume duties as acting principal when principal was off premises
- Prepare and administer daily announcements
- Assume duties as requested by Principal

- Run Staff Meetings
- Lead book discussion groups
- Conduct Teacher Evaluations
- Successfully mediated hostile situations between teachers and parents
- Lead Grade Level Meetings

### **TEACHING EXPERIENCE**

1992-1993: 5th Grade, LaSalle Elementary, School City of Mishawaka  
 1993-1995: 5th Grade, Twin Branch Elementary, School City of Mishawaka  
 1995-1996: 4th/5th Grade Split Level, Twin Branch Elementary  
 1996-1999: 5th Grade, Beiger Elementary/Junior High  
 2003-2006: 5th Grade, LaSalle Elementary, School City of Mishawaka  
 2000-2004: Summer School, School City of Mishawaka  
 2006-2007: 4<sup>th</sup> Grade, LaSalle Elementary, School City of Mishawaka  
 2007-2008: 5th Grade, LaSalle Elementary, School City of Mishawaka  
 2008-2008: K-6 Literacy Coach, Battell Elementary, School City of Mishawaka

### **COACHING EXPERIENCE**

- Boys Basketball, LaSalle Elementary - 1992
- Coed Track, LaSalle Elementary - 1993
- Coed Track, Twin Branch Elementary - 1993, 1994, 1995, 1996, 1997
- Football, Twin Branch Elementary - 1994
- Boys Basketball, Twin Branch Elementary - 1994, 1995
- Math Bowl Coach – 2005 to 2008

### **SERVICE AND LEADERSHIP**

#### **Committee Participation**

- Language Arts Adoption Committee Admin. Representative 2013
- Math Adoption Committee Admin. Representative 2012
- Speaker for the ICE conference 2006
- Math Committee (Co-Chair) - 2002 to 2009
- NCA (North Central Accreditation) Committee, 2002-2004
- Corporation Technology Committee, 2002-2003
- Child Intervention Committee, 1999-present
- Behavior Team Committee, 1999-presesnt
- Building Level Intervention Team, 1999-present
- Parent & Community Involvement, Twin Branch Elementary - 1994, 1995, 1996
- Parent & Community Involvement, Beiger Elementary - 1996-1999
- Social Committee, LaSalle Elementary - 1992, 1993
- Science Adoption Committee
- Practical and Theoretical Faculty Reading Group



- Social Studies Adoption Committee
- PTA, 1992-current

### **Conferences**

- IASP Conference Indianapolis 2009-2014
- Common Core National Conference, Chicago IL 2012
- Common Core State Conference Indianapolis, IN 2011
- ICTM (Indiana Council of Teachers of Mathematics) Indianapolis IN 2010-2012
- NCA/Advanced Ed Conference 2009-2012
- Title I Administrative Workshop Indianapolis, IN 2010
- Student Discipline Workshop, Plymouth IN 2010
- ICE (Indiana Computer Education), Indianapolis IN - 1997, 2004, 2005, 2006
- National Technology Conference 2005 New Orleans, Louisiana 2005
- C.L.A.S.S. Training 1999 – 2002 Indianapolis, Indiana
- NCA Training (North Central Accreditation), Indianapolis IN – 2002 - 2009
- HASTI (Hoosier Assoc. of Science Teachers, Inc.), Indianapolis, IN - 1993, 1999
- EEE (Economics, Environment and Education) IUPUI, Indianapolis IN - 1996
- Math & Computer Curriculum Improvement, Ball State University, Muncie, IN - 1994
- Indiana Science Education, Indianapolis IN - 1993
- Grant Writing Conference, Indianapolis IN - 1996

### **In-service presentations given**

- Co-instructor “Bridging the Gap: Involving the Community” @ ICE 2006
- Instructor, The Problem Solver – 2005
- Instructor, Intermediate Power Point - 2004
- Instructor, Integrate Pro Electronic Gradebook Software 2001 – 2002
- Instructor, Easy Grade Pro Electronic Gradebook Software – 1996 – 1999

### **In-service workshops attended**

- Teachers As Writers
- Publisher Software
- Teacher Mentorship Training
- Inspiration Software
- Easy Grade Pro Software
- Cognitive Coaching Training
- Teacher/Mentor Training
- Writing Rubric Training
- Cognitive Learning Assures Success (CLASS)
- Brain Research into Classroom Practice
- HyperStudio Software Training
- TESA (Teacher Expectations and Student Achievement)
- Language Arts Curriculum
- Science Development

- Gang Awareness
- Economics America Distance Learning Program
- Shurley Reading Program Curriculum Training
- Writers' Workshop

### **Special projects**

- Creating a sensory room and working with staff to create sensory corners in each classroom
- Worked with Community members to start and maintain enrichment activities
- Started Lego Robotics at Beiger Elementary 2013, State Qualifier 2013, 2014
- Started Lego Robotics at Liberty Elementary 2011, State Qualifier 2012
- Worked with community members to start a community garden 2011
- Implemented the DEEP program (gifted and talented) at Liberty 2010-11
- Investigate and purchase agendas for grades 2-6, 2001-2003
- Career Express Educator Internship, Workforce Development of Northern Indiana
- Public Service Announcement in conjunction with TCI Cable, 1999
- Project participant with National Dairy & Nutrition Council local chapter, in cooperation with Freimann Life Science Center at the University of Notre Dame, 1994-1999
- Pilot Shurley Reading Program Curriculum, 1999
- Pilot SAXON Mathematics Program Curriculum, 1998
- Supervising Teacher, IUSB Student Teacher Program, 1999
- Supervising Teacher, IUSB Student Observation Program, 1995-1999
- Corporate Representative, American Heart Association Heart Walk - 1997
- Science Curriculum Development, Beiger Elementary - 1996-1999
- Discipline Plan Development, Beiger Elementary - 1997
- Young Author's Conference - 1993-2003
- Counselor for 6<sup>th</sup> Grade Camp, Camp Eberhart - 1993
- Spelling Bee Judge - 1998, 1999
- Design and Implementation of Parent Handbook, Student Handbook

### **SPECIAL RECOGNITION**

- Teacher of the Year Award, Beiger Elementary, School City of Mishawaka - 1999
- Faculty member, LaSalle Elementary honored as a National Blue Ribbon School - 1999
- Principal, Liberty Elementary honored as an Indiana Four Star School – 2009-2010
- Nominated as IASP Principal of the year 2011 and 2012
- Principal, Beiger honored as a PTA National School of Excellence 2014-2016

## ADDITIONAL INFORMATION

- Credentials on file with Indiana Professional Standards Board  
Division of Licensing  
101 W. Ohio Street, Suite 300  
Indianapolis, IN 46204-1953  
Tel: 317-232-9010
- Additional references provided upon request
- Married 23 years with 1 son, member of Clay United Methodist Church

### **Administrative Accomplishments in more detail:**

- I pride myself on building an atmosphere of community, providing problem based learning, building strong relationships among all stakeholders, guiding and mentoring great teachers and ultimately creating a successful school.
- When starting my administrative career at Liberty Elementary in the winter of 2009, I entered a building midyear that was in its second year of probation for not meeting AYP. Liberty School had a poverty rate of 69%. By the 2009 -2010 school year (1 ½ years later) Liberty was an Indiana Four Star School. In fact Liberty was the only Indiana Four Star School with a free and reduced percentage greater than 63%. From that point on Liberty remained an “A” school. As I always tell my staff, “Do you truly believe that every child can learn? Poverty, family life, lack of motivation all do not hold a candle to the power a teacher has over a child. These are simply excuses that none of us should except.”
- My social worker and I started a community relationship with Harris Prairie Church. Through this we created a community garden, investigated creating a nature walk, started “back to school parties”, mentorship programs, and participated in the Fig Leaf Boutique where free clothes were given away.
- In 2010-2011 Liberty school added the DEEP program (gifted and talented) encompassing a 1/2, 3/4, and 5/6 split classes. Within these classes the concept of problem based learning was and still is taught.
- I started the Lego Robotic program where we went to state our second year.
- In 2011 I started All Pro Dad’s and we averaged over 150 attendees per event.
- Currently at Beiger Elementary I have again created a strong PTA, Lego robotics were we have gone to state 2 consecutive years, continued All Pro Dad’s breakfast, created a sensory room and sensory corners in classrooms. We have worked with community members to support a wood working class, cooking class, sewing class, and a chess club. Beiger was a “C” school when I came in 2013-2014. Beiger is now a “B” school.

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 3: Resumes of the proposed administrative/management team other than principal

1	Scott Braun	Assistant Principal
2	Renee Manno	Director of Curriculum (shared w/ CASB)
3	Rachell Davis	Special Education Director (shared w/ CASB)
4	Chad Addie	Director of Development (shared with CASB)
5	Michael Poynter	Athletic Director
6	Sarah Fine	Director of Student Service (shared with CASB)
7	Roger Johnson	IT Director (shared with CASB)
8	Tami Collins	H.R. Director (shared with CASB)
9	Evan Henry	Facilities Director (shared with CASB)

# SCOTT J. BRAUN

## OBJECTIVE

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Obtain a school administration leadership position in a dynamic school community where I can develop collaborative partnerships with students, staff, parents and community members to foster lifelong learning for all.

## EDUCATION

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Masters of Arts, Ball State University Muncie, IN  
Major: **Educational Administration and Supervision**

Bachelor of Science, University of Southern Indiana Evansville, IN  
Major: **Elementary Education**

Associate of Science, Northwest Shoals Community College Florence, AL  
Major: **General Education**

## LICENSES/CERTIFICATIONS

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Indiana Administration License, Grades K-12 Exp. 8/18/2015  
Indiana Elementary License, Grades 1-6 Exp. 9/23/2021  
Endorsement: Middle School Mathematics, Grades 6-9 Exp. 9/23/2021

## LEADERSHIP

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- **Principal, Pine Elementary Magnet School for the Visual and Performing Arts, 2013-present (Grades Pk-6)**
- **Sister School Agreement with Shenyang School, China 2013-present**
- **Indiana District 2 IASP Assistant Principal of the Year, April 2012**
- **Assistant Principal/Athletic Director, New Prairie Middle School, 2009-2013**
- **School Safety Specialist, New Prairie United Schools, 2009-2013**
- **Chair, Miscellaneous Textbook Adoption, New Prairie United Schools, 2013**
- **Chair, HEA 1419-Behavior/Discipline Committee, New Prairie United Schools, 2010-2013**
- **IASP District 2 Membership Chair, 2010-2013**
- **Regional Autism Training Team Laporte, 2010-2013**
- **Indiana Principal Leadership Academy Scholarship Recipient, 2007**
- **P.L. 221 Steering Committee Chair for Mathematics, 2007**
- **Assistant Athletic Director, Pendleton Heights Middle School, 2003-2007**
- **Chairperson: Bully Prevention Committee, 2005-2007**
- **Building Representative, Pendleton Heights Middle School, 2006-2007**

## PROFESSIONAL EXPERIENCES

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### **Principal**

*Pine Elementary Magnet School for the Visual and Performing Arts*      *Fall 2013-Present*

### **Assistant Principal/Athletic Director**

*New Prairie Middle School, New Carlisle, IN*      *Fall 2009-2013*

### **Assistant Principal**

*New Prairie High School, New Carlisle, IN*      *Fall 2008-2009*

### **Seventh and Eighth Grade Pre-Algebra and Algebra Teacher**

*Pendleton Heights Middle School, Pendleton, IN*      *Fall 2003-2008*

Created a learning atmosphere that was conducive to problem solving. Chaired various committees that focused on problem solving and reading comprehension relating to school improvement P.L. 221 plan.

### **Third Grade Teacher**

*Mary Castle Elementary, Lawrence, IN*      *Fall 2002-Spring 2003*

Adapted teaching style to meet the needs of all students. Participated in creating a behavioral support system to help children make better choices in school. Created class homepage to inform parents of classroom events.

## CONFERENCES/WORKSHOPS/ORGANIZATIONS/GRANTS/AWARDS

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- 
- **RISE Teacher Evaluation Training, 2012-Present**
- IASP Assistant Principal Conference, 2008-Present
- Responding to Cyber-Bullying, 2011
- Wells Fargo Grant, \$1,000, Certifying all Crisis Team members in CPR, 2011
- Indiana Aspiring Principals Conference, 2006
- Website Development In-Service, 2005
- ISTAR Training, 2005
- ESL Workshop, 2005
- Textbook Adoption Fair, 2004
- School Board Presentation: *Problem Solving in Middle Schools*, 2004
- E-Class Grades In-Service, 2003
- Problem Solving Professional Development, 2003
- Indiana Computer Educators Convention, 2003
- Member, Evansville Reading Council, 2001-2002
- Member, Student Education Association, 2001-2002

References Available Upon Request

# Renee Manno

5159 N Barclay ♦ LaPorte, Indiana 46350 ♦ (708) 878-9424 ♦ Reneemanno@sbcglobal.net

## Professional Profile

*Extremely driven, innovative 21<sup>st</sup> Century educational leader who implements distributive leadership to facilitate the development and continuous growth of ALL students, staff, and community members by creating an inclusive learning environment designed to foster high academic, social and emotional competencies, is focused on college and career readiness, and prepares students for an everchanging and highly competitive global society.*

## Education

### **Master's in Educational Administration and Supervision, 2015**

BALL STATE UNIVERISTY – Muncie, IN GPA: 3.916/4.0

### **Career and Technical Education Certificate, 2010**

BALL STATE UNIVERSITY – Muncie, IN GPA: 4.0/4.0

### **Transition to Teaching Program, 2008**

CALUMET COLLEGE OF SAINT JOSEPH'S – Whiting, IN GPA: /4.0

### **Bachelor of Business Administration, 2006**

CARTHAGE COLLEGE – Kenosha, WI GPA: 3.45/4.0

## Professional Experience

### **LAKE RIDGE SCHOOLS ♦ GARY, INDIANA ♦ 2009- PRESENT**

#### **College and Career Readiness Coordinator ♦ Calumet New Tech High School ♦ 2014-Present**

- ♦ Collaborates with staff to develop and implement curriculum, instructional strategies, materials and assessments aimed at achievement of college and career readiness benchmarks.
- ♦ Leads the implementation and development of the College Ready Assessments (CRAs) with all staff and the New Tech Network.
- ♦ Collaborates with Admin Team, School Counselors, Title 1 Coordinator, and Teachers to develop process and protocols to monitor, evaluate, and support college and career readiness standards for all students as evidenced through analysis of student data; including student work, assessment data, graduation rates, grade reports, attendance, and discipline.
- ♦ Assists the Administrative Team with the evaluation and improvement of college and career readiness programs, such as conducting classroom observations, facilitating grade-level team and learning log meetings, and coordinating professional development activities.

#### **Team Leader/Certified New Tech Trainer ♦ Calumet New Tech High School ♦ 2013-Present**

- ♦ Responsible for oversight of implementation of New Tech Model, project based learning approach,
- ♦ 1 to 1 computing, project/problem based learning, individualized instruction, data-driven instruction
- ♦ Developed professional developments based on the needs of the staff
- ♦ Mentored and supported first year facilitators in the implementation of the New Tech model
- ♦ Observed, monitored, and evaluated facilitators to ensure consistency of the implementation of the New Tech model in all classrooms
- ♦ Participated in New Tech New School site visits through speaker panels, critical friend protocol, project presentation, and demonstration classroom.

#### **District New Tech Team Member ♦ Lake Ridge Schools ♦ 2014-Present**

- ♦ Assisted with site visits to various New Tech schools for elementary, middle, and high school rollout

# Renee Manno

Résumé, Page 2

- ◆ Responsible for oversight of implementation of New Tech Model, project based learning approach,
- ◆ Developed "PBL Classroom Observation" guides for site visits for future elementary school facilitators
- ◆ Conducted "debriefing" and "takeaway" protocols to increasing understanding of the New Tech model after each site visit

## **Flex/Advisory Coordinator ♦ Lake Ridge Schools ♦ 2012-2013**

- ◆ Responsible for leading a team to oversee of implementation of a schoolwide remediation, maintenance, and enrichment program of core academic courses

## **School Improvement Committee Chair ♦ Lake Ridge Schools ♦ 2009-2010**

- ◆ Chair of Expectations Policy Committee

## **CTE/College Career Readiness/Business Facilitator ♦ Calumet New Tech High School ♦ 2009-Present**

- ◆ Responsible for CTE programs and services
- ◆ Developed and designed course curriculum to fit the 21<sup>st</sup> century skills needed, aligned to the Indiana State standards
- ◆ Collaborated with the guidance department to offer a work ethic certification from the Center for Workforce Innovation
- ◆ Worked with community members to deepen the understanding of the content
- ◆ Developed and implemented individualized differentiated instruction to meet the needs of all students

## **CTE COORDINATOR ♦ Thornton Fractional District 215 ♦ Calumet City, Illinois ♦ 2009**

- ◆ Responsible for the oversight of 125 students
- ◆ Communicated with employers every two weeks to discuss the evaluation of the student employee
- ◆ Monitored and evaluated student growth and professionalism in the workplace
- ◆ Designed improvement action plans for those students who were viewed as "in need of improvement" by their employers

## **STUDENT TEACHER ♦ Wilbur Wright Middle School ♦ Munster, Indiana ♦ 2008**

- ◆ Responsible for all aspects of planning, managing, and instructing students from grades 6-8
- ◆ Created student-centered activities that showed student growth and mastery
- ◆ Collaborated with supervising teacher to ensure standards were being properly assessed and students were moving along at an appropriate rate.

## **Professional Development**

- ◆ PLC Workshop (CCR): Valparaiso University
- ◆ Literacy in the Classroom with Schauna Findlay-Relue
- ◆ New Tech Coach for Longfellow Elementary School (Lake Ridge Schools)
- ◆ Ready NWI
- ◆ New Tech Network National Conference 2014
- ◆ New Tech Network National Convergence 2013
- ◆ New Tech Network National Convergence 2010
- ◆ New Tech Network Certified Trainer 2014
- ◆ New Tech Certified Teacher 2013
- ◆ Midwest MoM Spring 2013
- ◆ Literacy Support Center
- ◆ CRA's – Career Readiness Assessments
- ◆ Flex (Advisory) Rollout



# Renee Manno

Résumé, Page 3

- 
- ◆ 1:1 Technology Rollout
  - ◆ ACT Annual Conference 2013
  - ◆ Career and Technical Education: Where is it going? – Purdue University
  - ◆ 8 Step Process
  - ◆ Effective Supervision with the Art & Science of Teaching (Marzano)
  - ◆ PBIS - Positive Behavioral Interventions and Supports
  - ◆ Technology in the Classroom
  - ◆ Differentiated Instruction
  - ◆ Curriculum Mapping

## Professional Presentations

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- ◆ New Tech National Conference: Collaboration Clinic: Using Technology
- ◆ New Tech Network: New School Training 2013

## Skills Summary

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- |                          |                           |                            |
|--------------------------|---------------------------|----------------------------|
| ◆ Collaborative Leader   | ◆ Computer Proficient     | ◆ Marketing                |
| ◆ Instructional Leader   | ◆ Data-driven             | ◆ Interactive Media        |
| ◆ Excellent Communicator | ◆ Creative Problem-Solver | ◆ Team Leader              |
| ◆ Flexible, Multi-tasker |                           | ◆ Professional Development |

## Licensure

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- ◆ State of Indiana Teacher's License
  - Content Area: Business
  - School Setting: All Schools
  - License No. 1606481
  - Expires: June 13, 2015
  
- ◆ State of Indiana Teacher's License
  - Content Area: Career and Technical Education: Business Services and Technology
  - School Setting: All Schools
  - License No. 1606481
  - Expires: June 13, 2015

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References

Angela Piazza  
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Wilbur Wright Middle School  
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Valparaiso, IN 46383  
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Principal/Director of New Tech  
Calumet New Tech High School  
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Certified New Tech Trainer/Facilitator  
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3900 Calhoun Street  
Gary, IN 46408  
219-916-1621  
[cwierzbicki@lakeridgeschools.net](mailto:cwierzbicki@lakeridgeschools.net)

Rachell A. Davis  
220 Webster Avenue, Plymouth, IN, 46563  
Cell: 574-229-1594  
[rachelldavis1@gmail.com](mailto:rachelldavis1@gmail.com)

**Objective:**

To further my career in special education leadership using my knowledge, experience and enthusiasm to engage and mentor individuals in the educational field .

**Education:**

Master of Education, Indiana Wesleyan University, Marion, IN, 2011

Bachelor of Science, Special Education- Mild Disabilities K-12, Ball State University, Muncie, IN, 2002

**Indiana Educator License: Professional Degree- Master**

- Special Education, Mild Disabilities All Grade: K-12, Rules 46-47, Valid: 4/10/2022

**Experience:**

- Special Education Teacher/Interventionist, Plymouth Community School Corporation, Plymouth, IN, 2012-present
- Special Education Teacher/Interventionist, Joint Educational Services in Special Education, Plymouth, IN, 2004-2012
- Special Education Teacher, Warsaw Community School Corporation, Warsaw, IN, 2002-2004

**Presentations:**

Instructor for Differentiated Instruction in Plymouth Community School Corporation.

- Selected by my superintendent to teach a differentiated instruction class to educators in the school corporation. Educators were taught the philosophy of differentiated instruction, strategies to use in the classroom, and time to develop curriculum to differentiate for classroom instruction.

Introduction to Special Education for New Teachers in Plymouth Community School Corporation

- Selected by my superintendent to give a presentation on Special Education for new teachers in the corporation. The presentation was a basic level of Special Education, explanation of the different disabilities, expectations, ways to accommodate/modify grade level instruction/curriculum, strategies for special education/struggling learners to be successful in the general education classroom with peers.

**Skills and Qualifications:**

- Special Education Lead Teacher- Lead teacher in the Special Education department at Lincoln Jr. High School, attending monthly meetings to develop ways to incorporate new leadership skills and present concepts to staff. As a leadership team we research different learning styles, teaching strategies, and other areas in education.
- Reading and Math Data Coordinator- Schedule AimsWeb benchmark assessments for math and reading school wide, and strategically monitor students on a bi-weekly or monthly basis. Responsible for tracking all the math and reading data for the school. AimsWeb is a universal screening, progress monitoring and data management system that supports Response to Intervention and tiered instruction.
- Mentor for New Teachers- Mentor for new teachers at Lincoln Jr. High School following the Indiana Department of Education IMAP guidelines.

# ChadAddie

## Education

K-12 Administration, 2009 4.0 GPA	Bethel College, Mishawaka, IN IN Building Level Administrator #1033080
CSAYC, 2006	IN-AJSOP Credentialed Clinician / Youth Trauma
MS Education, 2003 4.0 GPA	Indiana University, South Bend, IN Certified School Counselor – IN/MI
BA Psychology, 1985 4.0 GPA, <i>Summa Cum Laude</i>	Olivet Nazarene University, Bourbonnais, IL Minors: Greek/Religion

## Experience

### Public Education

*"ALL students have the innate capacity to learn, grow, and change the world about them."*

### Community Education

*"I implore you to see with a child's eyes, to hear with a child's ears, and to feel with a child's heart."*

*-Antonio Novello*

<b>Boone Grove Middle School</b>	Boone Grove, IN	2006 - Present
<i>-School Counselor / Assistant to Principal:</i> Licensed administrator and co-facilitator for the School Improvement Plan leading to the #1 rating for most improved middle school in Indiana, 2008 & 2009 ISTEP; 2010 produced top scores in school history; co-leader with positive discipline model leading to school climate improvement.		
<b>River Valley School District</b>	Three Oaks, MI	2003 - 2005
<i>-Guidance Counselor / District School of Choice Coordinator:</i> Coordinated 6-12 Student Services programs, secondary intervention/transition specialist, instructional mentor/staff development, and District-level community liaison.		
<b>New Prairie High School</b>	New Carlisle, IN	2001 - 2002
<i>-Social Service Director:</i> Coordinator of school-based social services, including Character Education, ISTEP innovations, remedial instruction coordinator, School Improvement Team, instructional mentor, and student transition programs.		
<b>LaPorte Community Schools</b>	La Porte, IN	1998 - 2001
<i>-Crisis Counselor:</i> Primary provider of social services for 2,750 middle / high school students, intervention counseling, teacher resource, transition programs coordinator, administrator liaison, increased student-centered programs, 400% student increase.		
<b>The Children's Campus</b>	Mishawaka, IN	2005 - 2006
<i>-Therapist:</i> Coordinator of therapeutic and educational services for self-contained, residential boys placed for severe reactive aggressive disorders and trauma, staff oversight and development, holistic family counseling and community reintegration.		
<b>Dockside Services</b>	LaPorte, IN	2004 - 2005
<i>-Therapist:</i> Intervention counseling for court appointed at-risk youth and families.		
<b>HealthWorks! Kids Museum</b>	South Bend, IN	2002 - 2004
<i>-Educator/Program Developer:</i> Creative educational venue inspiring elementary and middle school students relative to healthy choices and pro-social growth; 2004 featured educator on nationally televised PBS special <i>Excellence in a Disruptive Age</i> .		

- Leadership Academy for PCSC- Nominated by my colleagues to be part of the Leadership Academy in Plymouth Community School Corporation. This leadership role was developed to give educators the opportunity to be a lead teacher in an area of expertise. A teacher must complete the leadership program in order to apply for a lead teacher position in the corporation.
- Member of Math Data Committee- The math committee meets once a month to discuss common assessments and data to see what is successful and what concepts need to be retaught.
- STAT Team Member- The STAT team consists of Special Education teachers, Language Arts and Math teachers, principals, and the school counselor. Students are brought in front of the STAT team for the Response to Intervention process, to determine if the student will need a Tier 2 or Tier 3 Intervention based on data and classroom performance.
- Interventionist for Language Arts and Math- Provide Tier 3 Language Arts and Math interventions in a small group setting by planning curriculum and a differentiated approach to teaching.
- Integrating Technology into the Classroom with a 1:1 learning environment
- Proficient in multiple computer programs including: Microsoft Office (Word, Excel, PowerPoint), Apple-Mac (Pages, Numbers, KeyNote), iMovie, Pivot- Data Warehouse, Canvas
- Google Docs, Twitter, Blogger
- Indiana IEP- Trainer for new special education teachers at Lincoln Jr. High School

**Extracurricular Activities:**

- Home and School Association Member at St. Michael Catholic School, Plymouth, IN.
- 5 Star Assistant Coach- 5 Star is a middle school program encouraging teens to live a five star lifestyle by making good choices and leading by example.
- Member of Tri Kappa Sorority
- Lincoln Jr. High Girls Head Track Coach

**References:**

Dan Funston  
 Assistant Superintendent  
 Plymouth Community School Corporation  
 574-780-4539

Michele Riise  
 Director of Quality Programs/Office Manager  
 Plymouth Community School Corporation  
 574-936-3115

Susan LaFree  
 Math Teacher- Lincoln Jr. High School  
 Plymouth Community School Corporation  
 574-546-4770

Penny Hines  
 Autism Consultant  
 Joint Educational Services in Special Education  
 574-276-2388

**Michael T. Poynter**

441 W. 300 S.

Valparaiso, IN

46385

219-462-9210

mykalp70@gmail.com

**Objective** To obtain a position at the Career Academy of South Bend

**Work Related Experience**

August 2006 to present Boone Grove Middle School-Valparaiso, IN

**Literacy Teacher**

- Teach 8<sup>th</sup> grade literacy/language arts/high ability

June 2000-2006 Highland High School-Highland, IN

**English Teacher**

- Taught grades 9-12

August 2004-2006 Highland High School-Highland, IN

**Assistant Athletic Coordinator/Interim Athletic Director**

- Assisted the athletic director in the direct supervision and operation of all athletic events

October 1992 to 2006 Highland High School-Highland, IN

**Head Varsity Wrestling Coach**

July 1994 to October 2004 & July 2010 to present

Highland High School-Highland, IN & Boone Grove High School-Valparaiso, IN

**Assistant Varsity Football Coach**

**Boone Grove-Winfield Pop Warner Coach (2006-2008)**

2008 Division III State Champions

**Education** **Purdue University Calumet: Hammond, IN**

- Received Bachelor of Arts in Secondary English Education in May 2000;
- 3.30 GPA

**Olivet Nazarene University: Kankakee, IL**

- Member of NCCAA national runner-up wrestling team

**Activities/** **Purdue University Calumet Semester Honors (6)**

**Honors** **ACEP Coaching Certification, since 1993**

**Indiana Teacher Leadership Academy Graduate 2006**

**Smekens Reading/Writing/6 Traits Attendee: 2008/2014**

**Family** **Wife: Angie, of 21 years; two children: Cody (19), Colin (14)**

## Private Education

"Great societies educate with a sense of purpose and meaning."

## Community Leadership

"There are no great things done, only small things done with great love."

-Mother Teresa

**Vineyard Community Church** Cincinnati, OH 1992 - 1995  
-Program Director: Developed programs for 12-19 year old students in urban church of 3,000 diverse members, including staff and volunteer development; Urban outreach and community development; U.S. Youth Director overseeing 250 churches.

**Vineyard Christian Fellowship** Valparaiso, IN 1987 - 1992  
-Associate Pastor: Oversaw all programs relative to family education, including specific emphasis on adolescent education; responsible for staff development, at-risk teens and community food pantry, and leadership of community youth networking group.

**Church of the Nazarene** Valparaiso, IN 1985 - 1987  
-Youth Pastor: Engaged in comprehensive Christian Education for adolescents and their families; Regional Youth Director overseeing special programs for 57 region churches.

**Impact Society/Heroes Program** Valparaiso, IN 2010 - Present  
-Consultant: Canadian based Character Ed program, pilot school implementer in U.S.

**LaPorte Drop-out Prevention** LaPorte, IN 2009 - Present  
-Education Team: Volunteer member for community steering committee.

**The Father's House** LaPorte, IN 2001 - Present  
-Coordinator: Serves disaffected community members & families in transition.

**Familia Community Outreach** LaPorte, IN 1988 - 2007  
-Coordinator: Local and extended relief work serving Latino population.

**Atlanta Olympics Outreach** Atlanta, GA 1995-1996  
-Coordinator: Oversaw 5,000 international students serving in the Atlanta Games.

**SOS Urban Ministries** Cincinnati, OH 1992 - 1994  
-Organizer: Urban relief programs locally and with extension to major US cities.

**First Contact** Valparaiso, IN 1988 -1992  
-Coordinator: Coordinated food pantry and social services for local families in crisis.

**LeVasseur Elementary School** Bourbonnais, IL 1983  
-Student Teaching: Conducted classroom with physically challenged primary students.

## References

**Mr. Paul Schlottman**  
Principal  
Boone Grove M.S.  
325 W. 550 S.  
Boone Grove, IN 46302  
219.669.7060  
schlottman@ptsc.k12.in.us

**Mr. Marvin Thomae**  
County Coordinator  
LaPorte Drop-out Prevention  
501 Pine Lake Ave  
LaPorte, IN 46350  
219-363-8567  
marv.thomae.gw4z  
@statefarm.com

**Mr. Nick Brown**  
Superintendent  
Porter Township Schools  
248 South 500 West  
Valparaiso, IN 46385  
219.988.4141, Ext. 1000  
nbrown@ptsc.k12.in.us

**Mr. James Holifield**  
Principal  
New Prairie Middle School  
5325 N. Cougar Rd.  
New Carlisle, IN 46552  
219.778.4435  
jholifield@npusc.k12.in.us

**Dr. Paul Tougaw**  
Education Dept. Head  
Valparaiso University  
Miller Hall  
Valparaiso, IN 46383  
219-476-0116  
Paul.Tougaw@Valpo.Edu

**Dr. Ralph Stutzman**  
Graduate Education Director  
Bethel College  
1001 West McKinley Ave.  
Mishawaka, IN 46545-5591  
574.257.3493  
stutzmr@bethelcollege.edu

**Ms. Colleen Sweeney**  
Director of Innovation  
Memorial Hospital  
615 N. Michigan St.  
South Bend, Indiana 46601  
574-309-2786  
csweeney@memorialsb.org

**Rebecca Zakowski**  
Manager/Replication  
HealthWorks! Kids Museum  
111 W. Jefferson St.  
South Bend, IN 46601  
574.647.2690  
rzakowski@memorialsb.org

"...Sarah's gentle nature and good humor make her a joy to work with, and her intelligence and competence are undeniable..."

Dr. Linda Thompson,  
INDOE consultant

"...Ms. Fine leads with integrity and a strong desire to make learning a continuous process of growth ...she has clinical skills that provide sensitivity and accuracy in assessing student needs while taking into account the systems influencing students..."

Dr. Angela Jackson  
University Professor  
Director of Human Rights  
Commission, Michigan  
City

"Sarah shows excellent leadership skills and communication skills ...I could not recommend anyone more highly on the basis of ethics, fairness or integrity."

Dr. Jeffrey Jones  
Vice Chancellor  
Student Affairs  
Indiana University,  
South Bend

"Seldom have I written a letter of recommendation for someone where so many superlatives come to mind...there are few for whom I hold such high professional and personal regard."

Dr. Lynda Fosco  
Killingly Public Schools  
Director Early Childhood  
Center

## Sarah Fine

9166 W 200 N ■ Michigan City, IN 46360 ■ 219-871-9716 ■ fine4u@comcast.net

### Licensed Clinical Social Worker – School Administrator

*I am an enthusiastic educator and clinician; highly skilled in creating, implementing, and sustaining successful systems of care which empower students' attainment of academic achievement and personal health.*

**Objective:** Share my passion for education and expertise of school social work within in a progressive educational institution.

### Core Competencies

- IN school attendance/ legal settlement laws
- IN Student Due Process laws
- Alternative Education facilitation
- Building collaborative networks in support of students/families
- SWIS facilitator certification
- Student drop-out prevention
- Article 7; Special Education laws
- Grant writing, program implementation, assessment.
- Program capacity development
- Skilled clinician
- AVID district director certification

### Public Education and Clinical Experience:

School City of East Chicago, East Chicago, Indiana

Michigan City Area Schools, Michigan City, Indiana

Killingly Public Schools: Killingly, Connecticut

Natchaug Psychiatric Hospital, Storrs, CT

Professional Resource Group, P.C., Storrs, CT

B.E.T.A. (Birth Education Training and Acceptance), Orlando, FL

*My career includes providing direct services to students (ages, birth through adolescence) and families living within rural, small city and urban communities. Recognized for my leadership and clinical skills by each administration I served, promotions to higher levels of responsibilities came quickly and culminated in district-wide management of all student services within two school districts.*

### Key Contributions:

- Clinical supervision and service development of school social workers, school counselors, school nurses, school parent liaisons, school attendance officers, and college internships.
- District Director of AVID (college bound student preparatory program).
- Student Services program assessment, policy development and training.
- Crisis intervention assessment, policy development and training.
- Writing, coordination, monitoring and assessment of federal and state grants inclusive of Title IV; Elementary Counseling Grant; Federal School-based Mentoring Grant, Even Start Family Literacy Grant; 21st Century Grant; and School-based Clinic Grant.
- Facilitator for Special Education services; ages: birth to five years.
- Teen Parent Advocate focusing on educational program development and assessment within a family literacy model.
- Co-facilitator of District Strategic Plan development and implementation
- Child, Adolescent and Family Clinician within private psychiatric settings.

### Conference presentations:

- National: Even Start Annual Conference; School Board Association
- Regional: Midwest Regional Mentoring Conference; NW Indiana Mentoring Summit
- State: Title I Conference; IN Legislative Study Committee; IN School Board Conference; IN Systems of Care Conference
- Mayor's Conference on Disability Awareness; Community presentation on variety of topics such as Bullying and Cyber-Bullying

### Education and Credentials:

Florida State University – Tallahassee, Fl.: Master of Social Work

University of Illinois – Springfield, IL: B.A. Child, Family Community Service

Licensed: Clinical Social Worker; School Social Worker



## **SKILLS**

- Master Project Manager and Documentation
- Master Programmer using Microsoft Technologies (ASP.NET, C#, SQL Server)
- Master Report Designer/Builder
- Microsoft Certified Database Administrator
- Microsoft Certified Systems Engineer
- Microsoft Certified Desktop Support Technician
- Microsoft Certified Trainer
- A+ Hardware/Software Certified
- Network+ Certified
- Cisco Certified Professional
- Business Objects User / Integrator
- Skilled in all Office Applications
  - Word, Excel, Access, PowerPoint, Projects, OneNote
- Trained Educator/Instructor
- Trained Public Speaker
- Self-Motivated and Goal Orientated

**ROGER JOHNSON**

# ROGER JOHNSON

RogerMCT@UChicago.edu  
6885 Portage Ave, Portage, IN. 46368  
219.588.0841

## EDUCATION

### **Purdue University**

*BA - Management of Information Systems* – Expected Award Spring 2017  
Currently Enrolled and Actively Pursuing

## EXPERIENCE

### **University of Chicago | Department of Health Studies**

*Lead Programmer / Project Manager Nov. 2002 – Current*

- Managed simultaneous projects from inception to completion
- Focused on end user experience and usability
- Programmed custom applications to fulfill business needs
- Advanced the goal of single data point and eliminated data duplication/double entry
- Managed teams and individuals
- Managed all aspects of project management (Determine requirements from stack holders and end users, developed milestones with deliverables and timelines, documentation)
- Directed IT services to build, maintain, and improve Infrastructure services
- Planned/Budgeted for future needs and goals
- Integrated several University systems together for the benefit of both parties
- Designed and Built Network Infrastructure to support University needs and goals

### **Microsoft Trainer | Microsoft Contractor**

*Aug. 2000 - Nov. 2002*

- Traveled the country training Fortune 500 companies on Microsoft Technologies.
- Was instrumental at understanding client needs and customizing solutions to fit their goals

# Tamara D. Collins

53335 County Murray Drive • Granger, IN 46530 • (574) 514-4983 • ecollins53t@att.net

## **SUMMARY**

Self-motivated, results oriented business professional with diverse experience in Human Resources, Purchasing and Government Contract negotiation. Highly effective in leading employees at all levels of the organization. Exceptional interpersonal and communication skills, with a proven ability to work effectively in teams and/or independently.

## **PROFESSIONAL EXPERIENCE**

### **United Technologies Corporation (UTC) 1978 to 2009**

UTC is a \$64.8 billion corporation that provides high technology products to the aerospace and building systems industries throughout the world.

**Sullair a Division of Hamilton Sundstrand (A UTC Company) - Sullair is a Global Manufacturer of Industrial and Construction Air Compressors.**

### **Senior Analyst, Human Resources Specialist - Michigan City, IN 2006 to 2009**

Provided direct support to manufacturing management in the execution of policies, procedures, staffing, employee relations, recruiting, interviewing, benefits administration, training, leadership development, workforce restructuring support, team building and process improvement initiatives.

- Administered and revamped the new hire orientation process which reduced the process time from as many as four weeks to one day, clarified the scope of the material provided on day one and utilized the IT department to generate an electronic workflow process.
- Initiated the flawless execution of the check distribution process improvement initiative which resulted in a 50% increase in the number of employees utilizing direct deposit.
- Coordinated INROADS Summer intern hiring process by improving the existing "Super Day". Identified as best in class within Hamilton Sundstrand.
- Led the Human Resources Department in meeting company wide mandated process improvement goals.
- Drove a 15% increase in employee satisfaction for the Human Resources Department through the collection of market feedback data and strategic action plans.
- Counseled with employees at various levels of the organization.
- Developed robust action plans to reduce hire cycle time from 300+ days to less than 60 days.
- Partnered with the Executive Staff to maximize employee engagement within the company.
- Identified and screened qualified candidates for hard to fill hourly and salaried positions by working with recruiters, attending job fairs, interviewing candidates, and collaborating with the hiring manager to select viable candidates.
- Conducted investigations and administered discipline to hourly and salaried employees, up to and including discharge as well as implementing and maintaining warning letters.
- Managed benefits open enrollment.
- Conducted training and development for Supervisors including sexual harassment, affirmative action, safety and Company policies and procedures.
- Conducted process improvement training within the Human Resources Department.
- Processed and conducted employee transfers and terminations.
- Partnered with the medical department in reassigning medically restricted employees in compliance with Workers' Compensation regulations.
- Investigated/Assisted with EEO complaints and gathered facts for the claims.
- Coordinated all aspects of a successful placement firm (professional, temporary/direct placement).
- Coordinated data requests with outside consultant and Hamilton Sundstrand Corporate Office in preparation for OFCCP audit.

### **Sourcing Agent/Senior Purchasing Analyst - Michigan City, IN 1998 to 2006**

Analyzed production requirements, inventory levels and managed flow of material to ensure optimization of inventory. Negotiated pricing with Suppliers and developed relationships with new buying sources.

Managed procurement activity i.e. planning, organizing and controlling the acquisition of materials and resources required for the company.

- Located and brought on new suppliers to maintain a low cost, high quality supplier base.
- Developed strategic supplier relationships for successful project implementation.
- Facilitated transition team meetings to engage buyers and managers in each business unit to ensure a smooth transition from one supplier to another.
- Partnered with the finance department and suppliers to resolve pay-term issues, invoice discrepancies, and non-payment issues, in an effort to avoid any interruption of part shipments and maintain supplier relationships.
- Participated on the purchasing council team to support improvement of standard work across all business units and work toward improving communication between commodity management team and Purchasing.
- Drove effort to obtain the lowest cost possible, while keeping quality, customer satisfaction and timely delivery as the primary goals.
- Appointed to work with commodity management team to review and track cost savings opportunities.
- Teamed with product engineering, division personnel, and key suppliers during new product launches to ensure new parts were identified and available prior to market release date to ensure seamless transition.
- Negotiated with suppliers to determine minimum buy quantities, lifetime buy quantities, and order fluctuations to fill requirements.
- Appointed as Company representative in supplier meetings to resolve poor supplier performance in availability and communication.
- Reduced the number of backorders over sixty days, allowing for early detection and resolution of potential problems.
- Successfully interfaced with Supplier Quality, Engineering and Operations organizations to resolve quality and technical issues.
- Negotiated LTA's (Long Term Agreements) and Contracts with suppliers.

**HAMILTON SUNDSTRAND A DIVISION OF UTC** - Hamilton Sundstrand is among the world's largest suppliers of technologically advanced aerospace and industrial products with approximately 18,300 employees at more than 50 major facilities worldwide.

**Contract Specialist/Sr. Contract Administrator - Rockford, IL 1991 to 1998**

Managed and negotiated contracts and subcontracts for major Aerospace and Defense companies. Review, analysis and negotiation of military and space contract terms and conditions and overall business arrangements and agreements including performance metrics, schedule management and document control for major subcontracts.

**EDUCATION**

**Master of Business Administration 2003**  
Regis University, Denver, CO

**Bachelor of Science, Business Administration, Minor Management 1978**  
Tennessee State University, Nashville, TN

**PROFESSIONAL DEVELOPMENT**

Training and Development, Counseling, Staffing and Employee Relations, Team Building, Focused Interviewing, Recruitment and Selection, Negotiation Skills, Policy, Procedure and Standard Work Preparation, Process Improvement (Lean Processes) and Events coordination. Trained in Stephen Covey's "Seven Habits of Highly Effective People".

**TECHNICAL SKILLS**

Proficient In Microsoft Office, Webi (Web based HR tool used to compile and manage employee personal and professional data), Nobscot (Exit interview tool), HodesIQ (Database used to gather and evaluate applicant data)

**Evan L. Henry**  
**Project Manager / LEED A.P.**

31751 Inwood Road  
North Liberty, IN. 46554

Email: [ehenry1226@aol.com](mailto:ehenry1226@aol.com)

Phone: 574-288-9292  
Cell 574-279-1132

**OBJECTIVE:** Acquire a full-time position as a Building & Grounds Facilities Manager with consideration to occupant's safety & security.

**EXPERIENCE:**

2011 to 2012 Panzica Building Corp., Inc. (1 year)

**Onsite Project Superintendent:**

- Oversee and coordinate activities between owner, architect and multiple contractors for renovation of an existing 100,000 s.f. facility for use as a charter school.
- Maintain quality control standards and adherence to specifications for all scopes of work.
- Effectively manage, coordinate and schedule activities for all trades.
- Oversee a work force in excess of 100 men and women.
- Conduct portions of Job Progress Meetings.
- Create provisions for onsite safety, monitor / enforce safety regulations and maintain M.S.D.S. manuals.
- Assist with close-out procedures including "Punch List" requirements and owner training for their new facilities.

1984 to 2010 Kaser-Spraker Construction, Inc. (26 years)

**Project Manager / Design & Build Consultant / Estimator:**

- Prepare all required documents for implementation of a construction project including but not limited to the following documents: Contracts, Subcontracts, Purchase Orders, Transmittals, Submittals, Meeting Minutes, Request for Information, Change Orders, Operations & Maintenance Manuals, etc.
- Prepare and track Submittals and Requests for Information.
- Proficient in client design / build sales presentations including preliminary sketches.
- Coordinate Office to Field communication and relationships.
- Prepare Invitations to Bid and solicit subcontractor pricing.
- Used acquired knowledge of blue-prints, specifications and field experience to prepare estimates from bid documents.

**EXPERIENCE (Cont.):**

**Kaser-Spraker Field Superintendant / Construction Manager:**

- Oversee and coordinate activities between owner, architect and contractors for multiple turnkey building projects costing up to \$ 10,000,000.00.
- Maintain quality control standards and adhesion to specifications for all scopes of work.
- Effectively manage, coordinate and schedule activities for all trades.
- Oversee a work force in excess of 50 men and women.
- Conduct Job Progress Meetings and generate Meeting Minutes for distribution.
- Create provisions for onsite safety, monitor / enforce safety regulations and maintain M.S.D.S. manuals.
- Implement close-out procedures including "Punch List" requirements and owner training for their new facilities

**Carpenter:**

- Effectively perform all scopes of carpentry work including building layout, excavations, concrete foundations, framing, exterior finishes and interior finishes.

1982 to 1984

Dillon Enterprises, Inc. (1 1/2 years)

**Fabricator / Welder:**

- During this slow construction period, I worked as a race car chassis fabricator / welder. This firm constructed chassis' for racing teams such as Mark Martin and Rusty Wallace. The knowledge and skills that I acquired during this period of time have proven extremely useful in the field of construction making me aware of the importance of quality, safety and doing things correctly the first time.

1980 to 1982

Robert Henry Corp. (1 1/2 years)

**Laborer / Apprentice Carpenter / Yard Manager / Driver :**

- Manage and inventory a construction yard including in-stock building materials and construction equipment.
- Load and deliver materials / equipment to field personnel.
- Attend Carpentry Apprenticeship classes in the evening.

**EDUCATION:**  
2009

**United States Green Building Council**

- Attended training and earned accreditation as a LEED Accredited Professional from the USGBC.

**EDUCATION (continued):**

- Conferences:**           **Misc. Training**
- Have attended multiple construction seminars and training exercises related to the construction industry including the "World of Concrete Expo" programs.
- 1979 to 1983**           **Carpentry Apprenticeship Training**
- Attended evening carpentry apprenticeship classes and participated in on-site training.
- 1974 to 1978**           **North Liberty High School**           **North Liberty, IN.**
- Earned H.S. diploma majoring in Math, English and Industrial arts.

**REFERENCES:**

Mr. Gary Spraker	Kaser-Spraker Construction	574-232-8010
Mr. Steve Yaw	Bethel College	574-257-3498
Mr. Roger Potratz	dh2w, inc. architecture / planning	219-872-9406

**PERSONAL GOAL:**

It is my goal that an employer will find me to be a task oriented, self motivated, detail oriented, competent employee capable of using the construction knowledge / skills that I have gained to benefit their operations. Throughout my career I have diligently worked to gain the respect of clients, architects, contractors, fellow employees and my recent employer. I plan to maintain that reputation as I continue my career in the industry based on honesty, loyalty and integrity.

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 4: Governance Documents:

- 501(c)(3) approval
- Articles of Incorporation
- Bylaws



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 13 2011

CAREER ACADEMY OF SOUTH BEND INC  
4100 EDISON LAKES PARKWAY STE 260  
MISHAWAKA, IN 46545

Employer Identification Number:  
27-3113436  
DLN:  
17053344308010  
Contact Person: GERALD HOLLAND ID# 95031  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(ii)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 28, 2011  
Contribution Deductibility:  
Yes  
Addendum Applies:  
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

CAREER ACADEMY OF SOUTH BEND INC

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,



Lois G. Lerner  
Director, Exempt Organizations

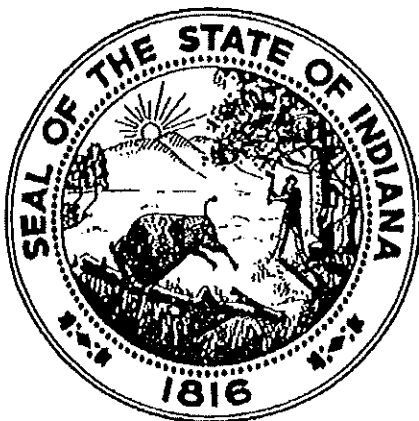
Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

State of Indiana  
Office of the Secretary of State  
CERTIFICATE OF INCORPORATION  
of  
CAREER ACADEMY OF SOUTH BEND, INC.

I, Todd Rokita, Secretary of State of Indiana, hereby certify that Articles of Incorporation of the above Non-Profit Domestic Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented confirms 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, July 14, 2010.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, July 14, 2010

A handwritten signature in black ink that reads "Todd Rokita".

TODD ROKITA,  
SECRETARY OF STATE

APPROVED AND FILED  
TODD ROKITA  
INDIANA SECRETARY OF STATE  
7/14/2010 11:34 AM

**ARTICLES OF INCORPORATION**

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Formed pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991.

**ARTICLE I – NAME AND PRINCIPAL OFFICE**

---

CAREER ACADEMY OF SOUTH BEND, INC.  
3605 Gagnon Drive, South Bend, IN 46628

**ARTICLE II – REGISTERED OFFICE AND AGENT**

---

Steven Hartz  
3605 Gagnon Drive, South Bend, IN 46628

**ARTICLE III – INCORPORATORS**

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Steven Hartz  
3605 Gagnon Drive, South Bend, IN 46628  
Signature: Steven Hartz

**ARTICLE IV – GENERAL INFORMATION**

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Effective Date: 7/14/2010

Type of Corporation: Public Benefit Corporation

Does the corporation have members?: No

The purposes/nature of business  
public charter school

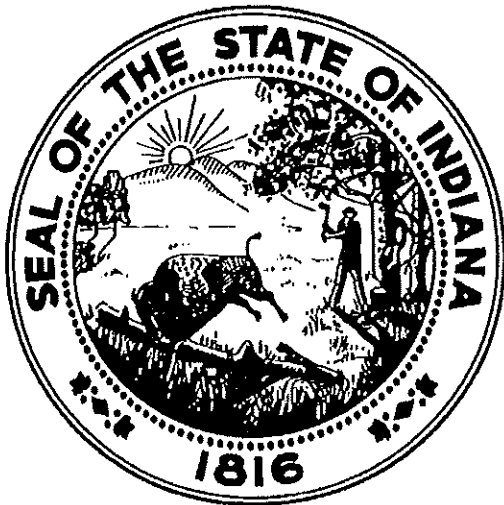
Distribution of assets on dissolution or final liquidation  
to another public charter school, balance to another non-profit educational entity

**State of Indiana  
Office of the Secretary of State**

**CERTIFICATE OF AMENDMENT  
of  
CAREER ACADEMY OF SOUTH BEND, INC.**

I, CHARLES P. WHITE, Secretary of State of Indiana, hereby certify that Articles of Amendment of the above Non-Profit Domestic 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 Friday, May 27, 2011.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, May 27, 2011.

A handwritten signature in black ink that reads "Charles P. White".

CHARLES P. WHITE,  
SECRETARY OF STATE



ARTICLES OF AMENDMENT TO THE ARTICLES OF INCORPORATION (NONPROFIT)

State Form 4101 (R10 / 1-03) / Corporate Form No. 364-2 (May 1988) Approved by State Board of Accounts 1995

TODD ROKITA SECRETARY OF STATE CORPORATIONS DIVISION 302 W. Washington St., Rm. E018 Indianapolis, IN 46204 Telephone: (317) 232-6570

11 MAY 27 PM 4:10

Indiana Code 23-17-17-1 et seq. FILING FEE: \$30.00

INSTRUCTIONS: Use 8 1/2" x 11" white paper for attachments. Present original and one copy to address in upper right corner of this form. Please TYPE or PRINT. Please visit our office on the web at www.sos.in.gov.

ARTICLES OF AMENDMENT TO THE ARTICLES OF INCORPORATION

The undersigned officer of the Nonprofit Corporation named in Article I below (hereinafter referred to as the "Corporation") desiring to give notice of corporate action effectuating Amendment(s) to the Articles of Incorporation, certifies the following facts:

This Corporation exists pursuant to: (check appropriate box)

- The Indiana Not-For-Profit Corporation Act of 1971 (IC 23-7-1.1) as amended.
Indiana General Not-For-Profit Corporation Act (approved March 7, 1935)
Indiana Nonprofit Corporation Act of 1991 (IC 23-17-1) as amended

APPROVED AND FILED Charles M. Loeser, INDIAN SECRETARY OF STATE

ARTICLE I - Amendment(s)

SECTION 1: The name of the Corporation is:

Career Academy of South Bend, Inc.

SECTION 2: The date of Incorporation of the Corporation is:

July 14, 2010

SECTION 3: The name of the Corporation following this amendment to the Articles of Incorporation is:

Career Academy of South Bend, Inc.

SECTION 4

The exact text of Article(s) II and IV of the Articles of Incorporation is now as follows.

Article II: Registered Office and Agent: Charles M. Loeser, 4100 Edson Lakes Parkway, Suite 260, Mishawaka, IN 46545

Article IV: The purposes/nature of business:

- (a) The purpose is to operate a charter school to be known as South Bend Career Academy, exclusively for charitable and educational purposes in accordance with Section 501(c)3 of the Internal Revenue Code or corresponding section of any future federal tax code.
(b) 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 its educational/charitable purposes.
(c) 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.

SECTION 6

The date of adoption of the amendment to the Article(s) II and IV was May 26, 2011

**ARTICLE II - MANNER OF ADOPTION AND VOTE**

**SECTION 1: Action by Board of Directors**

The Board of Directors duly adopted a resolution proposing to amend the Article(s) of Incorporation: *(select one)*

- At a meeting held on \_\_\_\_\_, 20 11, at which a quorum of such Board was present.
- By written consent executed on May 26, 20 11, and signed by all members of such Board.

**SECTION 2: Action by members**

**IF APPROVAL OF MEMBERS WAS NOT REQUIRED:**

The Amendment(s) were approved by a sufficient vote of the Board of Directors or Incorporators and approval of members was not required.  
 Yes    No

The Amendment(s) were approved by a person other than the members, and that approval pursuant to Indiana Code 23-17-17-1 was obtained.  
 Yes    No

**IF APPROVAL OF MEMBERS WAS REQUIRED:**

	TOTAL	MEMBERS OR DELEGATES ENTITLED TO VOTE AS A CLASS		
		1	2	3
MEMBERS OR DELEGATES ENTITLED TO VOTE				
MEMBERS OR DELEGATES VOTED IN FAVOR				
MEMBERS OR DELEGATES VOTED AGAINST				

The manner of the adoption of the Articles of 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 By-Laws of the Corporation.

I hereby verify, subject to penalties of perjury, that the facts contained herein are true.

Signature of current Officer



Printed name of Officer

Charles M. Loeser

Title of Officer

Assistant Secretary

**State of Indiana  
Office of the Secretary of State**

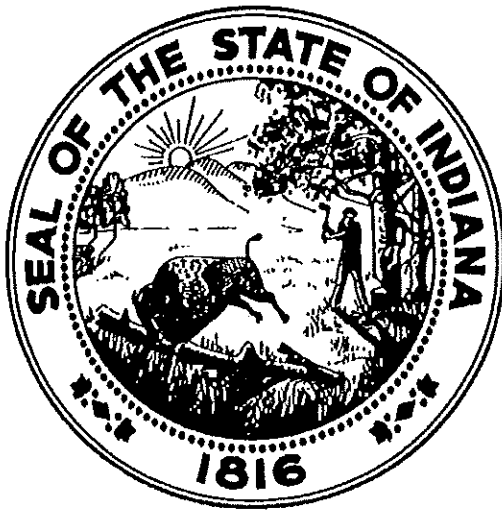
CERTIFICATE OF AMENDMENT

of

**CAREER ACADEMY OF SOUTH BEND, INC.**

I, CHARLES P. WHITE, Secretary of State of Indiana, hereby certify that Articles of Amendment of the above Non-Profit Domestic 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 Thursday, September 22, 2011.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, September 22, 2011.

A handwritten signature in black ink that reads "Charles P. White".

CHARLES P. WHITE,  
SECRETARY OF STATE





**ARTICLES OF AMENDMENT TO THE ARTICLES OF INCORPORATION (NONPROFIT)**  
 State Form 4161 (R11 12-11) / Corporate Form No. 364-2 (May 1988)  
 Approved by State Board of Accounts 1095

APPROVED  
AND  
FILED

*Charles P. White*  
IND. SECRETARY OF STATE

CHARLES P. WHITE  
SECRETARY OF STATE  
CORPORATIONS DIVISION  
302 W. Washington St., Rm. E018  
Indianapolis, IN 46204  
Telephone: (317) 232-6576

**INSTRUCTIONS:** Use 8 1/2" x 11" white paper for attachments.  
 Present original and one copy to address in upper right corner of this form.  
 Please TYPE or PRINT  
 Please visit our office on the web at [www.sos.in.gov](http://www.sos.in.gov).

Indiana Code 23-17-17-1 et seq.  
 FILING FEE: \$30.00

The undersigned officer of the Nonprofit Corporation named in Article I below (hereinafter referred to as the 'Corporation') desiring to give notice of corporate action effectuating Amendment(s) to the Articles of Incorporation, certifies the following facts:

This Corporation exists pursuant to: (check appropriate box)

- The Indiana Not-For-Profit Corporation Act of 1971 (IC 23-7-1.1) as amended.
- Indiana General Not-For-Profit Corporation Act (approved March 7, 1936)
- Indiana Nonprofit Corporation Act of 1991 (IC 23-17-1) as amended

RECEIVED  
IND. SECRETARY OF STATE  
SEP 22 2011

*Charles P. White*

**ARTICLE I AMENDMENT(S)**

SECTION 1: The name of the Corporation is:

Career Academy of South Bend, Inc.

SECTION 2: The date of Incorporation of the Corporation is (month, day, year):

July 14, 2010

SECTION 3: The name of the Corporation following this amendment to the Articles of Incorporation is:

Career Academy of South Bend, Inc.

SECTION 4

The exact text of Article(s) IV, V and VI of the Articles of Incorporation is now as follows.

Article IV – Purpose And Powers

Section 4.1: Purpose.

(a) The Corporation's purpose is to operate a charter school to be known as South Bend Career Academy (the "School"), exclusively for charitable and educational purposes in accordance with Section 501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code and in accordance with the provisions of the Indiana Charter Schools Act, Ind. Code 20-5.5, et. seq., as amended. In furtherance of the aforesaid purpose, to transact any and all lawful business for which corporations may be incorporated under the Indiana Nonprofit Corporation Act of 1991 (IC 23-17-1 et seq.), provided such business is not inconsistent with the Corporation being organized and operated exclusively for charitable educational purposes, Section 501(c)(3) of the Internal Revenue Code, and the Indiana Charter Schools Act.

(b) 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 its educational/charitable purposes.

(c) 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 by (1) 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 (2) 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.

(d) Subject to Article V below, upon the dissolution of the organization, its 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, and 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.

(e) Notwithstanding any other provision of these Articles of Incorporation, the Corporation shall not carry on any other activities not permitted to be carried on: (i) By a corporation exempt from Federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws, or (ii) by a corporation, contributions to which are deductible under Section 170(c)(2), Section 2055(a)(2), or Section 2522(a)(2) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

Section 4.2: Powers. Subject to any limitation imposed by the Indiana Nonprofit Corporation Act, Section 501(c)(3) of the Internal Revenue Code, the Indiana Charter Schools Act, or other applicable law, the Corporation shall have the power to do everything necessary, advisable or convenient for the accomplishment of any of the purposes hereinbefore set forth, or which shall at any time appear conducive to or expedient for the protection or benefit of the Corporation, and to do all of the things incidental thereto or connected therewith which are not forbidden by law;

Section 4.3: Limitations on Powers. If the Corporation is or becomes a private foundation (as defined in Section 509(a) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws), the Corporation shall be subject to the following requirements:

The Corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to the taxes on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

The Corporation shall not engage in any act of self-dealing that would subject any person to the taxes imposed on acts of self-dealing by Section 4941 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

The Corporation shall not retain any excess business holdings which would subject it to the taxes on excess business holdings imposed by Section 4943 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

The Corporation shall not make any investments in such a manner as to subject it to the taxes on investments that jeopardize charitable purposes imposed by Section 4944 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

The Corporation shall not make any expenditures which would subject it to the taxes on taxable expenditures imposed by Section 4945 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws.

#### Article V – Distribution of Assets on Revocation/Dissolution

If Ball State University (the Sponsor of the School under the Indiana Charter Schools Act) revokes the School's charter before the end of the term for which it is granted, or does not renew the charter, or the charter is otherwise

terminated before the end of the term for which it is granted, the provisions of Indiana Code 20-24-7-9 concerning distribution of local or state funds that remain to be distributed to the School shall apply.

If the Corporation is dissolved, then consistent with Indiana Code 20-24-3-3, the Board of Directors shall, after paying or making provision for the payment of all the liabilities of the Corporation, distribute all the assets of the Corporation exclusively for the purposes of the Corporation as follows:

First, all remaining funds received by the Corporation from the Indiana Department of Education ("Department") shall be returned to the Department not more than thirty (30) days after dissolution;

Second, all remaining assets shall be distributed in such manner, or to such organization or organizations organized and operated exclusively for educational or charitable purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent Federal tax laws, as the Board of Directors shall determine; and

Third, any such assets not so disposed of shall be disposed of by the Judge of the Circuit Court of Marion County, Indiana, 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 VI – Term of Existence The Corporation shall have perpetual existence.

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SECTION 5

The date of adoption of the amendment to the Articles was September 20, 2011.

**ARTICLE II - MANNER OF ADOPTION AND VOTE**

**SECTION 1: Action by Board of Directors**

The Board of Directors duly adopted a resolution proposing to amend the Article(s) of Incorporation: (select one)

At a meeting held on September 29, 2011 at which a quorum of such Board was present.

By written consent executed on \_\_\_\_\_, 2011 and signed by all members of such Board.

**SECTION 2: Action by members**

**IF APPROVAL OF MEMBERS WAS NOT REQUIRED:**

The Amendment(s) were approved by a sufficient vote of the Board of Directors or Incorporators and approval of members was not required.

Yes  No

The Amendment(s) were approved by a person other than the members, and that approval pursuant to Indiana Code 23-17-17-1 was obtained.

Yes  No

**IF APPROVAL OF MEMBERS WAS REQUIRED:**

**TOTAL**

**MEMBERS OR DELEGATES ENTITLED TO VOTE AS A CLASS**

1	2	3

MEMBERS OR DELEGATES ENTITLED TO VOTE	TOTAL	1	2	3
MEMBERS OR DELEGATES VOTED IN FAVOR				
MEMBERS OR DELEGATES VOTED AGAINST				

The manner of the adoption of the Articles of 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 By-Laws of the Corporation.

I hereby verify, subject to penalties of perjury, that the facts contained herein are true.

Signature of current Officer

*Charles M. Loeser*

Printed name of Officer

Charles M. Loeser

Title of Officer

Assistant Secretary

BYLAWS  
OF  
CAREER ACADEMY OF SOUTH BEND, INC.

ARTICLE I: General

Section 1: Name

The name of the corporation is Career Academy Of South Bend, Inc. (the "Corporation").

Section 2: Initial Registered Office and Initial Registered Agent

The post office address of the Corporation's initial registered office is 4100 Edison Lakes Parkway, Suite 260, Mishawaka, IN 46545. The registered agent in charge of the initial registered office is Charles M. Loeser.

Section 3: Fiscal Year

The Fiscal Year of the Corporation shall begin on the first day of July, and shall end on the last day of June in the following year.

ARTICLE II: Board of Directors

Section 1: Directors

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 have no less than five members, and no more than eleven. At all times all members of the Board of Directors shall be residents of the State of Indiana, and at least one-half of the members of the Board of Directors shall be residents of the Indiana counties where current students at the charter school reside.

Members of the Board of Directors will serve a term of roughly three years, with the term of each director as re-elected at the end of the original term, or a new director who is elected to replace a retiring director to end as of a different month so that during the month of the expiration of the term of a director, the other members of the board, as active directors, may re-elect such person to an additional term as a member of the Board, or elect a new member. The terms of each member shall expire at the end of the month of the third anniversary of the date of such re-election or appointment. The current board as of December, 2014 consists of:

- Lawrence Garatoni (term extends to January 31, 2017);
- Tracy Graham (term extended to February 28, 2017);

- Jinny Longbrake (replacing Bruce Greenberg, who resigned)(term extends to March 31, 2017);
- Vivian Sallie (term extends to April 30, 2017);
- Thomas Coley (replacing Rob Staley, who resigned)(term extends to May 31, 2017);
- Larry Davis (replacing James Summers, who resigned)(term extends to June 30, 2017);
- Suzanne Wiwi (term extends to July 31, 2017).

The term of each director as re-elected at the end of the original term, or a new director who may be elected to replace a retiring director, shall expire on the third anniversary of the date of such re-election or appointment. At the first meeting of each fiscal year, the Board of Directors shall elect all officer positions for the year.

#### Section 2: Quorum and Approval of Actions

A majority of the Directors must be in attendance at the beginning of a meeting to constitute a quorum for the transaction of any business properly to come before the Board of Directors. The approval of a majority of the Directors present at a meeting in which a quorum is present shall be considered the act of the Board of Directors. Any Director participating in a meeting by telephone may not vote or make motions, and shall not be counted towards a quorum. Notwithstanding the above, as of the July 1, 2013 effective date of the amendment of IC 5-14-1.5-3.6 to specify that the authorization for participation in meetings by conference call applies to a charter school, a member may participate on a voting basis in board meetings and in doing so will be counted towards a quorum, subject to compliance with the terms of said statute.

#### Section 3: Regular Meetings

The Board of Directors shall hold regular meetings on a monthly basis during the school year, with at least one meeting during the summer, for the purpose of transaction of such business as properly may come before the Board. Meetings shall be held in the school building or, until such time as a school building has been secured and is available for occupancy, at such location as the Board may determine.

#### Section 4: Special Meetings

The Board of Directors may hold special meetings for any lawful purpose upon no less than (2) business days notice, as described in Section 6 of this Article II, upon call by the Chair, or by two or more members of the Board. A special meeting shall be held at such date, time, and place inside the State of Indiana or elsewhere as specified in the call of the meeting.

#### Section 5: Compliance with Indiana Open Door Law

Notwithstanding any other provision of these Bylaws, the Corporation shall comply in all respects with the Indiana Open Door Law (currently codified at IC

5-14-1.5-1), and any corresponding provision of subsequent Indiana law, in connection with all regular or special meetings of the Board.

#### Section 6: Notice of Special Meetings

Oral or written notice of the date, time, and place of each special meeting of the Board shall be communicated, delivered, or mailed by the Secretary of the Corporation, 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 two business days 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.

Oral notice shall be effective when communicated. Written or electronic notice shall be effective at the earliest of the following:

- (a) When received;
- (b) Five (5) days after the notice is mailed, as evidenced by the postmark or private carrier receipt, if mailed correctly addressed on the address listed in the most current records of the Corporation;
- (c) 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; or
- (d) Thirty (30) days after the notice is deposited with another method of United States Postal Service other than first class, registered, or certified mail, as evidenced by the postmark, if mailed correctly addressed to the address listed in the most current records of the Corporation.

#### Section 7: Waiver of Notice

Notice of a meeting may be waived to a director in a writing 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 shall, at the beginning of the meeting or promptly upon the director's arrival, object to holding the meeting and not vote for or assent to any action taken at the meeting.

#### Section 8: Action by Written Consent

Any action required or permitted to be taken at any meeting of the Board, or any committee thereof, may be taken without a meeting if a 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 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 in this Section 8 shall have the effect of approval at a meeting and may be described as such in any document.

Section 9: Resignation, Removal, and Vacancies:

Any director may resign at any time by giving written notice of such resignation to the Board of Directors. Such resignation shall take effect at the time specified, or, if no time is specified, at the time of receipt by the Board. The acceptance of a resignation shall not be necessary to make it effective.

A director may be removed for cause by a majority of the directors then in office. Cause shall include, but not be limited to:

- (a) Violations of applicable law, including (but not limited to):
  - i. Violations of the Indiana Charter School Law; and
  - ii. Actions that would jeopardize the tax-exempt status of the Corporation or would subject it to intermediate sanctions under the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws (the "Code").
- (b) 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.
- (c) Breach of any governing document relating to the Corporation, including, but not limited to, the Articles, these Bylaws, and the Charter Agreement.
- (d) Inadequate attendance at meetings of the Board of Directors, as defined as absence from three consecutive meetings, or from more than 1/3 of the meetings within one calendar year; provided, that for this purpose, a member who participates in a meeting by conference call or video-conference shall not be considered as absent.

Any vacancy on the Board of Directors created by the resignation or removal of a director shall be filled by a majority of the directors then in office. Each new member of the Board of Directors shall be provided by the Secretary with a copy of the School's charter application (narrative portion, excluding exhibits) and shall confirm, prior to voting as a member of the board, that he or she has read and agrees with the school's goals and mission as described therein.

Section 10: Educational Management Organizations

Should the Board of Directors elect to engage an educational management corporation ("EMO") to manage the operations of the charter school for which the



Corporation is responsible, (the "School"), no member of the Corporation's Board of Directors nor an immediate relative of any director may have any pecuniary interest in such EMO.

ARTICLE III: Officers

Section 1: In General

The Officers of the Corporation shall consist of a Chair, a President, a Secretary, an Assistant Secretary, and a Treasurer. An officer may hold more than one office. Each officer shall be elected by the Board of Directors and shall serve for one year, or until the officers successor is duly elected.

Officers do not need to be members of the Board of Directors. Any officer may be removed by the Board of Directors at any time for cause as that term is defined herein in Article II, Section 9. Any vacancy in any office shall be filled by the Board of Directors, and any person elected to fill such vacancy shall serve until the expiration of the term vacated and until his or her successor is elected.

Section 2: Chair

The Chair shall preside at all meetings of the Board of Directors of the Corporation and shall be responsible for implementing the policies established by the Board of Directors, as well as other duties as prescribed by the Board.

Section 3: President

The President shall serve in place of the Chair during times in which the Chair is otherwise unavailable.

Section 4: Secretary and Assistant Secretary

The Secretary shall serve as the custodian, or shall delegate such duties as deemed necessary and expedient, of all papers, books, and records of the Corporation, other than books of account and financial records. The Secretary shall prepare, or shall cause to be prepared, and enter in the minute book the minutes of all meetings of the Board. The Secretary shall authenticate records of the Corporation as necessary, and shall perform other duties usual to such position as the Board of Directors or Chair may prescribe. An assistant secretary shall be designated to act as Secretary in the absence of or pursuant to instructions of the Secretary.

Section 5: Treasurer

The Treasurer shall oversee the School's chief financial officer ("CFO") and shall cause the CFO to (i) prepare and maintain (or cause others to prepare and maintain) correct and complete records of account showing accurately the financial condition of the Corporation; (ii) cause all notes, securities, and other assets coming into the possession of the Corporation to be received, accounted for, and placed in safekeeping according to proper audit and accounting principles; (iii) furnish (or cause to be furnished) a statement of the financial condition of the Corporation at each meeting of the Board or otherwise when requested by the Board of Directors or the Chair; (iv) perform other duties usual to the position of CFO as the Board of Directors or Chair may prescribe.

## ARTICLE IV: Committees

### Section 1: Executive Committee

The Board of Directors may, by resolution adopted by a majority of the directors then in office, designate two (2) or more directors of the Corporation to constitute an Executive Committee which, to the extent provided in such resolution and consistent with applicable law, shall have and exercise all of the authority of the Board of Directors in the management of the Corporation's affairs during intervals between the meetings of the Board of Directors. The Executive Committee shall be subject to the authority and supervision of the Board of Directors.

### Section 2: Other Committees

The Board of Directors may establish other committees, in addition to the Executive Committee, to accomplish the goals and execute the programs of the Corporation. Such committees shall have such responsibilities and powers as the Board of Directors shall specify. Members of such committees may, but need not, be members of the Board of Directors. A committee member appointed by the Board of Directors may be removed by the Board of Directors with or without cause.

## ARTICLE V: Conflicts of Interest

### Section 1: General Policy

It is the policy of the Corporation and its Board of Directors that the Corporation's directors, officers, and employees carry out their respective duties in a fashion that avoids actual, potential, or perceived conflicts of interest. The Corporation's directors, officers, and employees shall have the continuing, affirmative duty to report any personal ownership, interest, or other relationship that might affect their ability to exercise impartial, ethical, and business-based judgments in fulfilling their responsibilities to the Corporation. This policy shall be further subject to the following principles:

- (a) Directors, officers and employees of the Corporation shall conduct their duties with respect to potential and actual grantees, contractors, suppliers, agencies, and other persons transacting or seeking to transact business with the Corporation in a completely impartial manner, without favor or preference based upon any consideration other than the best interests of the Corporation.
- (b) Directors, officers, and employees of the Corporation shall not seek or accept for themselves of any of their relatives, including spouses, ancestors, and descendants, from any person or business entity that transacts or seeks to transact business with the Corporation, any gifts, entertainment, or other favors relating to their positions with the Corporation that exceed common courtesies consistent with ethical and accepted business practices.

- (c) If a director, or director's relative, directly or indirectly owns a significant financial interest in, or is employed by, any business entity that transacts or seeks to transact business with the Corporation, the director shall disclose that interest or position and shall refrain from voting on any issue pertaining to the transaction.
- (d) Officers and employees of the Corporation shall not conduct business on behalf of the Corporation with a relative or business entity in which the officer, employee, or his or her relative owns a significant financial interest or by which such officer, employee, or relative is employed, except by where such dealings have been disclosed to, and specifically approved and authorized by, the Board of Directors of the Corporation.
- (e) The Board of Directors may require the Corporation's directors, officers, or employees to complete annually (or as otherwise scheduled by the Board) a disclosure statement regarding any actual or potential conflict of interest described in these Bylaws. The disclosure statement shall be in such form as prescribed by the Board, and may include information regarding a person's participation as a director, trustee, officer, or employee of any other nonprofit organization. The Board shall be responsible for oversight of all disclosures or failures to disclose, and for taking appropriate action in the case of any actual or potential conflict of interest transaction.

Section 2: Effect of Conflict Provisions

The failure of the Corporation, its Board of Directors, or any or all of its directors, officers, or employees to comply with the conflict of interest provisions of these Bylaws shall not invalidate, cancel, void, or make voidable any contract, relationship, action, transaction, debt, commitment, or obligation of the Corporation that is otherwise valid and enforceable under applicable law.

ARTICLE VI: Indemnification

Section 1: Indemnification by Corporation

To the extent not inconsistent with applicable law, every person (and the heirs and personal representatives of such person) who is or was a director, officer, employee, or agent of the Corporation shall be indemnified by the Corporation against all liability and reasonable expense that may be incurred by him or her in connection with or resulting from any claim, action, suit, or proceeding (a) if such person is wholly successful with respect thereto or (b) if not wholly successful, then if such person is determined (as provided in Section 3 of this Article VI) to have acted in good faith, in what her or she reasonably believed to be the best interests of the Corporation, and with respect to any criminal action or proceeding, is determined to have had reasonable cause to believe that his or her conduct was lawful. The termination of any claim, action, suit, or proceeding by judgment, settlement, (whether with or without court approval), or conviction, or

upon a plea of guilty or of nolo contendere, or its equivalent, shall not create a presumption that a person did not meet the standards of conduct set forth in this Article VI.

### Section 2: Definitions

- (a) As used in this Article VI, the phrase “claim, action, suit, or proceeding” shall include any threatened, pending, or completed claim; civil, criminal, administrative, or investigative action, suit, or proceeding and all appeals thereof (whether brought by or on behalf of the Corporation, any other corporation, or otherwise), whether formal or informal, in which a person (or his or her heirs or personal representatives) may become involved, as a party or otherwise:
- (i) By reason of his or her being or having been a director, officer, employee, or agent of the Corporation or of any corporation where he or she served as such at the request of the Corporation, or
  - (ii) By reason of his or her acting or having acted in any capacity in a corporation, partnership, joint venture, association, trust, or other organization or entity where he or she served as such at the request of the Corporation, or
  - (iii) By reason of any action taken or not taken by him or her in any such capacity, whether or not he or she continues in such capacity at the time such liability or expense shall have been incurred.
- (b) As used in this Article VI, the terms “liability” and “expense” shall include, but shall not be limited to, counsel fees and disbursements and amounts of judgments, fines, or penalties against, and amounts paid in settlement by or on behalf of, a person.
- (c) As used in this Article VI, the term “wholly successful” shall mean (i) termination of any action, suit, or proceeding against the person in question without any finding of liability or guilt against him or her, (ii) approval by a court, with knowledge of the indemnity provided in this Article VI, of a settlement of any action, suit, or proceeding, or (iii) the expiration of a reasonable period of time after the making of any claim or threat of any action, suit, or proceeding without the institution of the same without any payment or promise made to induce a settlement.

### Section 3: Entitlement to Indemnification

Every person claiming indemnification under this Article VI (other than one who has been wholly successful with respect to any claim, action, suit, or proceeding) shall be entitled to indemnification if (a) special independent legal counsel, which may be regular counsel of the Corporation or any other disinterested person or persons, in either case selected by the Board of Directors, whether or not a disinterested quorum exists (such counsel or person or persons being hereinafter called the “referee”), shall deliver to the Corporation a written finding that such person has met the standards of conduct set forth in Section 1 of this Article VI and (b) the Board of Directors, appear before the referee and answer questions that the referee deems relevant and shall be giving ample opportunity to present to

the referee evidence upon which her or she relies for indemnification. The Corporation shall, at the request of the referee, make available facts, opinions, or other evidence in any way relevant to the referee's findings that are within the possession or control of the Corporation.

Section 4: Relationship to Other Rights

The right of indemnification provided in this Article VI shall be in addition to any rights to which any person may otherwise be entitled.

Section 5: Extent of Indemnification

Irrespective of the provisions of this Article VI, the Board of Directors may, at any time, and from time to time, approve indemnification of directors, officers, employees, agents, or other persons to the fullest extent permitted by applicable law, or, if not permitted, then to any extent not prohibited by such law, whether on account of past or future transactions.

Section 6: Purchase of Insurance

The Board of Directors is authorized and empowered to purchase insurance covering the Corporation's liabilities and obligations under this Article VI and insurance protecting the Corporation's directors, officers, employees, agents or other persons.

ARTICLE VII: Contracts, Checks, Loans, Deposits and Gifts

Section 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.

Section 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.

Section 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.

Section 4: Deposits

All funds of the Corporation shall be designated to its credit in such bank, banks, or depositories as the Board of Directors may designate. Such designation may be general or confined to specific instances.

Section 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.

ARTICLE VIII: Amendments

The power to make, alter, amend, or repeal the Bylaws is vested in the Board of Directors of the Corporation; provided, however, that any proposed substantive alteration, amendment, or repeal of these Bylaws must be approved in writing by the Sponsor of the School (as the term "Sponsor" is defined in IC 20-24-1-9) prior to the Board of Directors of the Corporation taking any action thereon.

These Bylaws have been adopted by proper motion by the Board of Directors at the initial Board of Directors meeting on February 14, 2011, as amended June 23, 2011 and further amended April 27, 2012, May 20, 2013, and January 20, 2015.

Attest,



Vivian Sallie  
Secretary

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 5: Statement of Assurances



**EDUCATION ONE, L.L.C. - CHARTER SCHOOL APPLICANT**  
**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 Education One, L.L.C. 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 *No Child Left Behind Act*, 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 Education One, L.L.C., Trine University, the Indiana Department of Education, 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 Education One, L.L.C. may revoke the charter if it deems that the recipient is not fulfilling the academic goals and/or fiscal management responsibilities outlined in the charter.

**Signature from Authorized Representative of the Charter School Applicant**

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

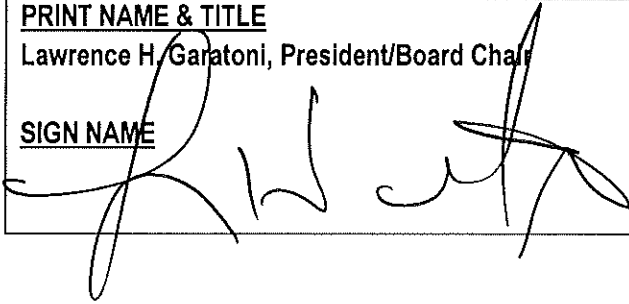
**PRINT NAME & TITLE**

Lawrence H. Garatoni, President/Board Chair

**DATE**

May 5, 2015

**SIGN NAME**



Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 6: Board Member Information

Note: board member resumes are included in Attachment 1 and are not reprinted here.

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Thomas Gregory Coley
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.

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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.

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.

N/A.  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.

N/A.  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.

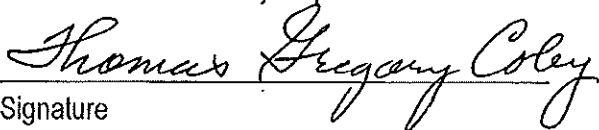
Does not apply to me, my spouse or family.  Yes

8. Indicate 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

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#### Certification

I, Thomas Gregory Coley, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

  
Signature

4.14.15  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Larry M. Davis
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.  
 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.  
 N/A.  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.  
 N/A.  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. Indicate 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

**Certification**

I, Larry M. Davis, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

Signature

Date

5/5/2015

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Lawrence H. Garatoni
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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

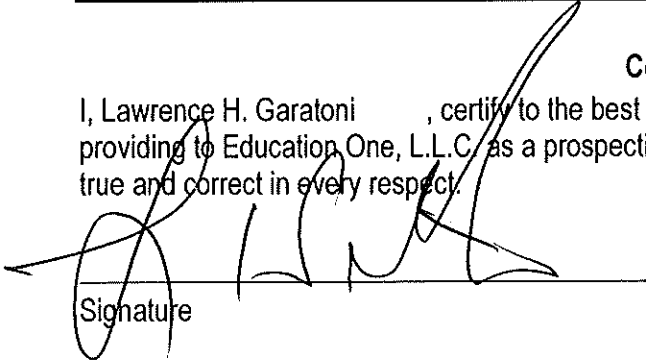
1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.



- I / we do not know any such trustees.  Yes – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.  
 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.  
 N/A.  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.  
 N/A.  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. Indicate 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

**Certification**

I, Lawrence H. Garatoni, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.



Signature

4/28/2015  
Date

**CHARTER SCHOOL BOARD MEMBER INFORMATION**

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Tracy D. Graham
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at his point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.  
 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.  
 N/A.  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.  
 N/A.  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. Indicate 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

### Certification

I, Tracy D. Graham, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

Tracy D. Graham  
Signature

04/13/2014  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Jinny Longbrake
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
- I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.
- 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.
- N/A.  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.
- N/A.  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. Indicate 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

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### Certification

I, Jenny Langbrake, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

Signature

Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Vivian G. Sallie
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.  
 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.  
 N/A.  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.  
 N/A.  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. Indicate 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

### Certification

I, Vivian G. Sallie, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

*Vivian G. Sallie*  
Signature

April 30, 2015  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(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, Education One, L.L.C. 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 founding 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:  
Currently a member of the board of Career Academy of South Bend, Inc., which operates the Career Academy of South Bend (grades 5-12) and is applying for a charter for an elementary school (K-6) to be called "Success Academy."
2. Your full name: Suzanne Wiwi
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
As noted in #1 above, I am already a member of the board of Career Academy of South Bend, Inc., so while I have experience with other organizations (as indicated in my resume), at this point what matters more is my involvement with this applicant (which per Disclosure #1 below is why I know the other board members).
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 the 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 – already know the other board members since we have been meeting as a board for governance of the Career Academy of South Bend.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes – already know the senior management of Career Academy which will also provide services to the Success Academy.
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 or management organization, 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 because the school does not intend to contract with an education service provider or school management organization.  
 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.  
 N/A.  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.  
 N/A.  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. Indicate 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

---

**Certification**

I, Suzanne Wiwe, certify to the best of my knowledge and ability that the information I am providing to Education One, L.L.C. as a prospective board member for Success Academy Charter School is true and correct in every respect.

Suzanne Wiwe  
Signature

04/30/2015  
Date

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 7: Code of Ethics and Conflict of Interest Policies

See Article V of Bylaws (included in Attachment 4)

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 8: ESP Documentation

Not Applicable

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

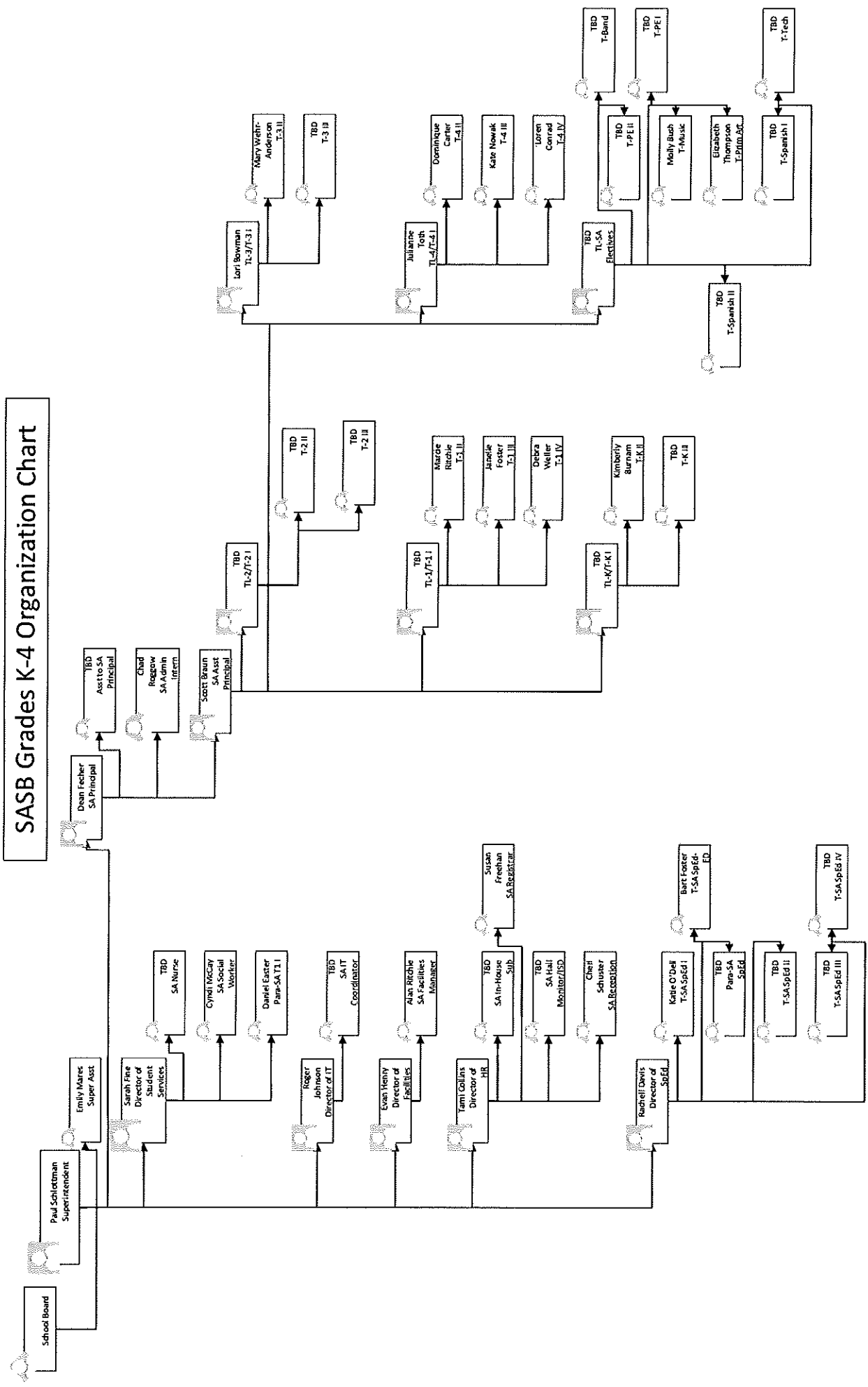
Attachment 9: Organization Business Plan

None: there are no plans for additional schools

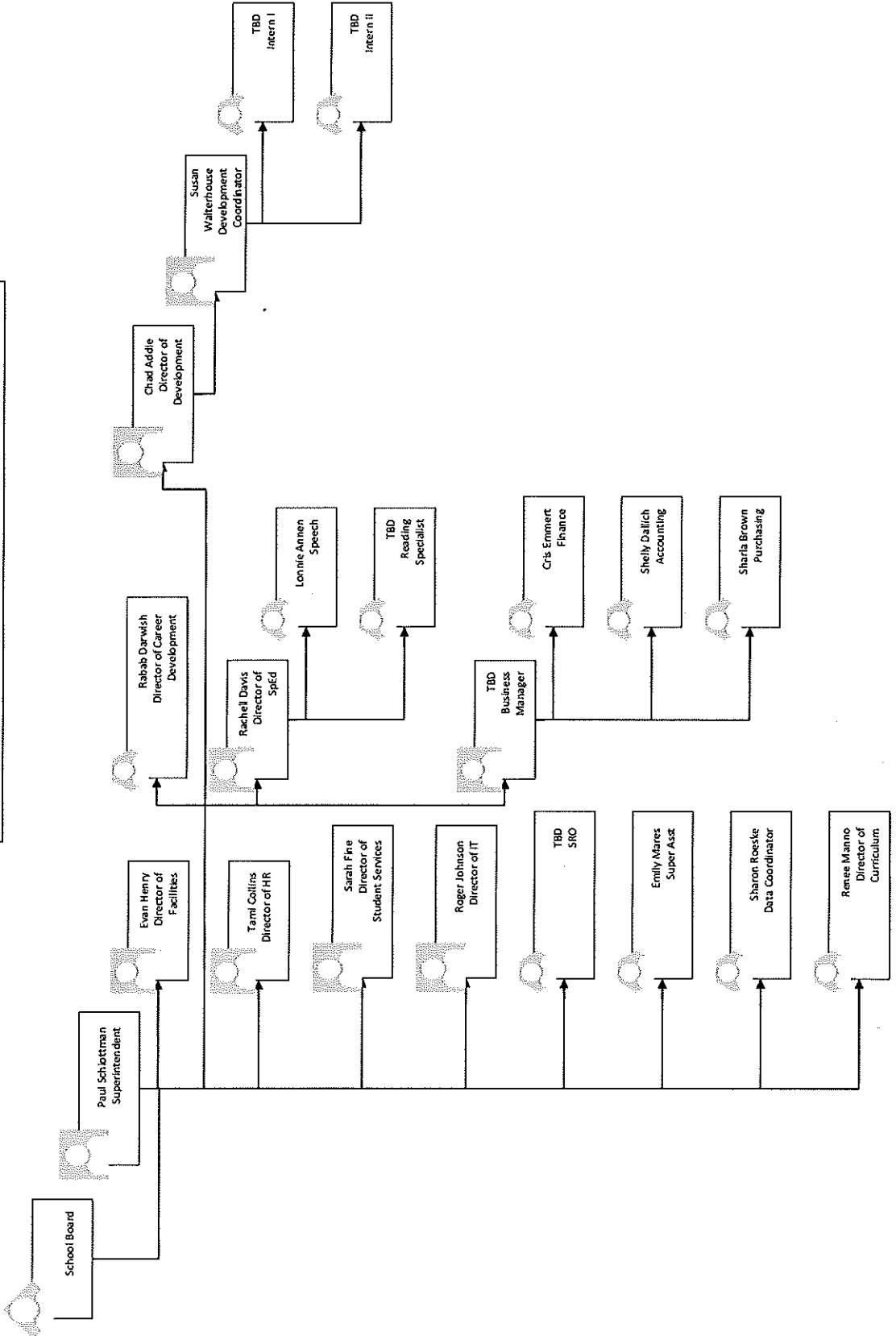
Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 10: Organizational Charts For Network And Proposed School

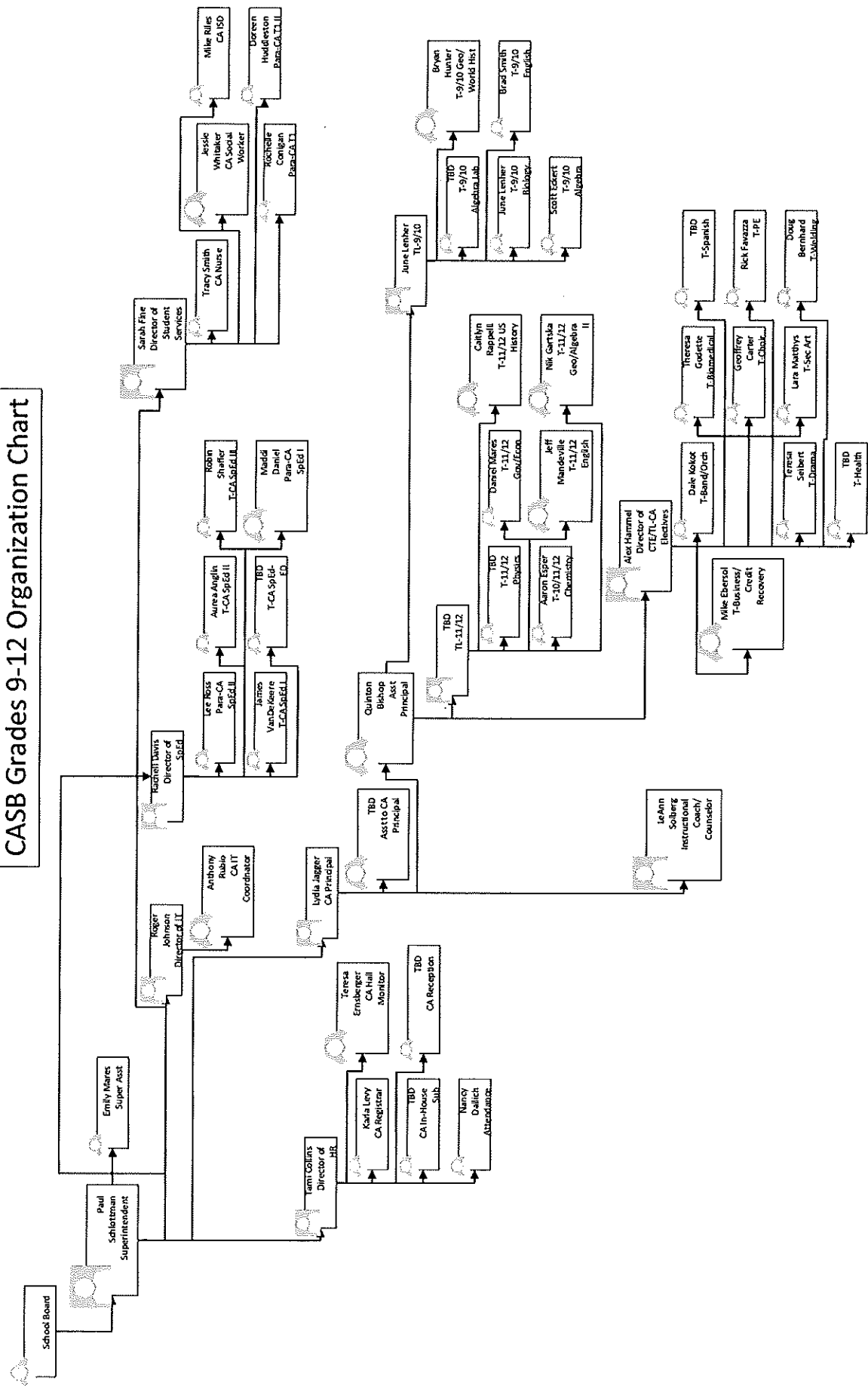
# SASB Grades K-4 Organization Chart



# SASB/CASB Executive Organization Chart

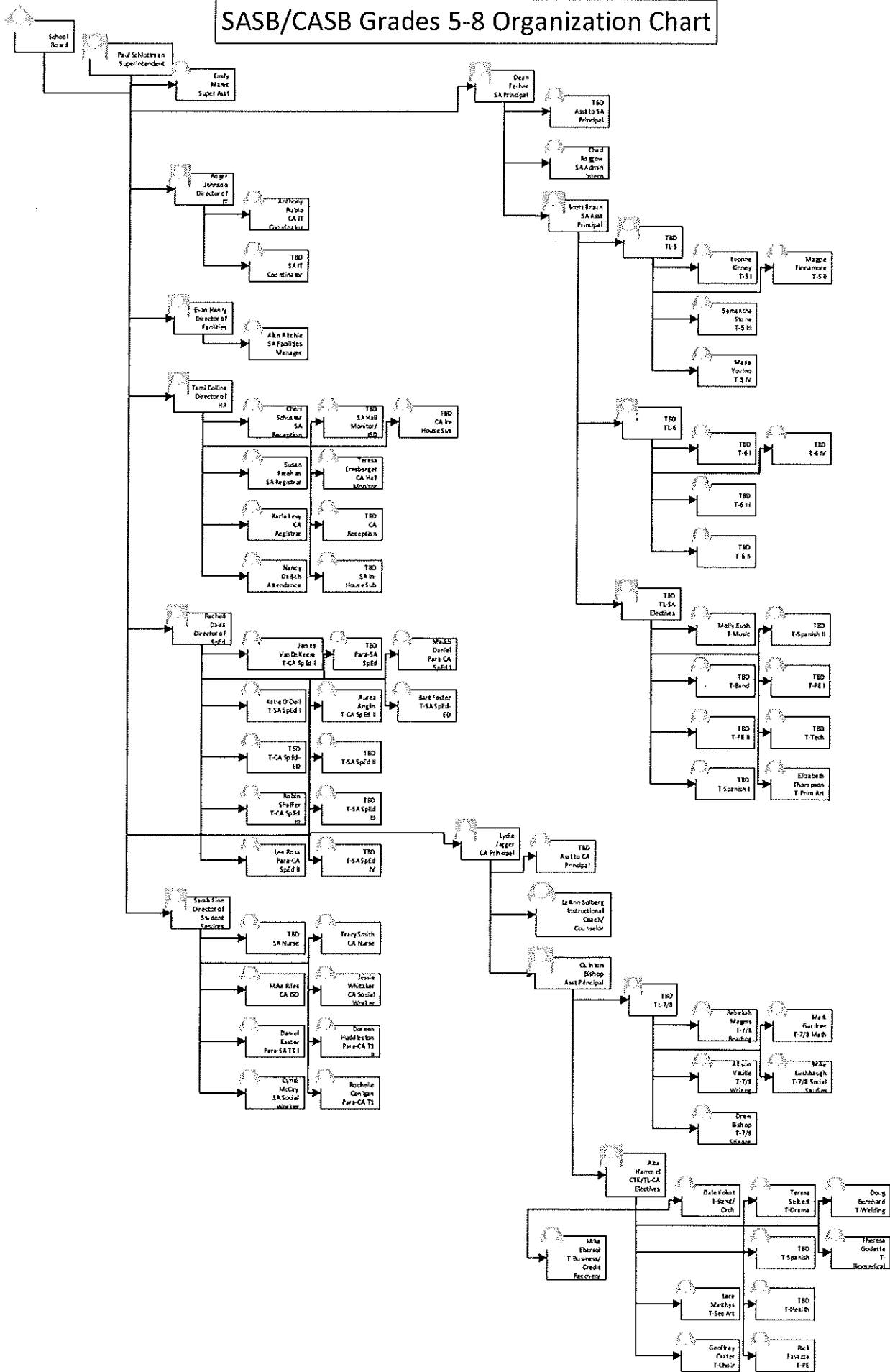


# CASB Grades 9-12 Organization Chart





# SASB/CASB Grades 5-8 Organization Chart



Career Academy of South Bend Application to Education One, LLC (Trine University)  
 Application for Success Academy of South Bend

Attachment 11: Core Curriculum

As required by law, SASB will follow the Indiana academic standards, <http://www.doe.in.gov/standards>, including the following:

English/Language Arts <http://www.doe.in.gov/standards/englishlanguage-arts>

ENGLISH/LANGUAGE ARTS STANDARDS VERTICAL ARTICULATIONS		
Title	Updated	Download
K-5 E/LA	07/11/2014	<a href="#">PDF</a>
6-12 E/LA	07/11/2014	<a href="#">PDF</a>

INDIANA CONTENT AREA LITERACY STANDARDS		
Title	Updated	Download
History/Social Studies Content Area Literacy	04/15/2014	<a href="#">PDF</a>
Science/Technical Studies Content Area Literacy	04/15/2014	<a href="#">PDF</a>

ENGLISH/LANGUAGE ARTS STANDARDS CORRELATION GUIDES		
Title	Updated	Download
Glossary (K-12)	05/29/2014	<a href="#">PDF</a>
Grade K	05/29/2014	<a href="#">PDF</a>
Grade 1	05/29/2014	<a href="#">PDF</a>
Grade 2	05/29/2014	<a href="#">PDF</a>
Grade 3	07/22/2014	<a href="#">PDF</a>
Grade 4	05/29/2014	<a href="#">PDF</a>
Grade 5	07/22/2014	<a href="#">PDF</a>
Grade 6	05/29/2014	<a href="#">PDF</a>

English/Language Arts Standards		
Title	Updated	Download

Kindergarten	07/15/2014	<a href="#">PDF</a>
Grade 1	07/15/2014	<a href="#">PDF</a>
Grade 2	07/22/2014	<a href="#">PDF</a>
Grade 3	07/15/2014	<a href="#">PDF</a>
Grade 4	07/15/2014	<a href="#">PDF</a>
Grade 5	07/15/2014	<a href="#">PDF</a>
Grade 6	07/15/2014	<a href="#">PDF</a>

Mathematics <http://www.doe.in.gov/standards/mathematics>

Mathematics Standards		
Title	Updated	Download
Kindergarten	06/26/2014	<a href="#">PDF</a>
Grade 1	06/26/2014	<a href="#">PDF</a>
Grade 2	06/26/2014	<a href="#">PDF</a>
Grade 3	06/26/2014	<a href="#">PDF</a>
Grade 4	06/26/2014	<a href="#">PDF</a>
Grade 5	06/26/2014	<a href="#">PDF</a>
Grade 6	06/26/2014	<a href="#">PDF</a>

Mathematics Standards Correlation Guides		
Title	Updated	Download
Grade K	06/26/2014	<a href="#">PDF</a>
Grade 1	05/29/2014	<a href="#">PDF</a>
Grade 2	05/29/2014	<a href="#">PDF</a>
Grade 3	05/29/2014	<a href="#">PDF</a>
Grade 4	05/29/2014	<a href="#">PDF</a>
Grade 5	05/29/2014	<a href="#">PDF</a>
Grade 6	05/29/2014	<a href="#">PDF</a>

**Mathematics Standards Resource Guides**

Title	Updated	Download
Grade K	07/22/2014	<a href="#">PDF</a>
Grade 1	07/22/2014	<a href="#">PDF</a>
Grade 2	07/22/2014	<a href="#">PDF</a>
Grade 3	07/22/2014	<a href="#">PDF</a>
Grade 4	07/15/2014	<a href="#">PDF</a>
Grade 5	07/15/2014	<a href="#">PDF</a>
Grade 6	07/01/2014	<a href="#">PDF</a>

**Mathematics Standards Vertical Articulations**

Title	Updated	Download
Math K-2 Vertical Articulation	05/12/2014	<a href="#">PDF</a>
Math 3-5 Vertical Articulation	05/12/2014	<a href="#">PDF</a>
Math 6-8 Vertical Articulation	06/16/2014	<a href="#">PDF</a>

**Indiana Content Area Literacy Standards**

Title	Updated	Download
Science/Technical Studies Content Area Literacy	04/15/2014	<a href="#">PDF</a>

Science <http://www.doe.in.gov/standards/science>

**Indiana Academic Standards – Science 2010**

Title	Updated	Download
K-8 Science Standards	08/31/2012	<a href="#">PDF</a>
Kindergarten	08/31/2012	<a href="#">PDF</a>
Grade 1	08/31/2012	<a href="#">PDF</a>
Grade 2	08/31/2012	<a href="#">PDF</a>
Grade 3	08/31/2012	<a href="#">PDF</a>

Grade 4	08/31/2012	<a href="#">PDF</a>
Grade 5	08/31/2012	<a href="#">PDF</a>
Grade 6	08/31/2012	<a href="#">PDF</a>

Indiana Content Area Literacy Standards		
Title	Updated	Download
Science/Technical Studies Content Area Literacy	04/15/2014	<a href="#">PDF</a>

Social Studies <http://www.doe.in.gov/standards/social-studies>

Indiana Academic Standards – Social Studies 2014		
Title	Updated	Download
Kindergarten	07/18/2014	<a href="#">PDF</a>
Grade 1	07/18/2014	<a href="#">PDF</a>
Grade 2	07/18/2014	<a href="#">PDF</a>
Grade 3	07/18/2014	<a href="#">PDF</a>
Grade 4 + Resources	03/17/2015	<a href="#">PDF</a>
Grade 5 + Resources	03/17/2015	<a href="#">PDF</a>
Grade 6 + Resources	03/17/2015	<a href="#">PDF</a>

INDIANA CONTENT AREA LITERACY STANDARDS		
Title	Updated	Download
History/Social Studies Content Area Literacy	04/15/2014	<a href="#">PDF</a>

Social Studies Correlation Guides		
Title	Updated	Download
Kindergarten	08/20/2014	<a href="#">PDF</a>
Grade 1	08/20/2014	<a href="#">PDF</a>
Grade 2	08/20/2014	<a href="#">PDF</a>

Grade 3	08/20/2014	<a href="#">PDF</a>
Grade 4	08/20/2014	<a href="#">PDF</a>
Grade 5	08/20/2014	<a href="#">PDF</a>
Grade 6	08/20/2014	<a href="#">PDF</a>

<b>Social Studies Standards Vertical Articulations</b>		
<b>Title</b>	<b>Updated</b>	<b>Download</b>
Grade K-3 Vertical Articulation	07/18/2014	<a href="#">PDF</a>
Grade 4-5 Vertical Articulation	07/18/2014	<a href="#">PDF</a>
Grade 6-7 Vertical Articulation	07/18/2014	<a href="#">PDF</a>
U.S. History Vert Articulation	07/18/2014	<a href="#">PDF</a>

Attachment 12: Exit Standards For Graduating Students

Since Indiana does not have specified standards for promotion from one grade to the next, SASB will use the Michigan Grade Level Content Expectations, [http://www.michigan.gov/mde/0,1607,7-140-22709\\_28463-162769--,00.html](http://www.michigan.gov/mde/0,1607,7-140-22709_28463-162769--,00.html), including the following:

**Final Functional Independence Social Studies EGLCE/EHSCEs**

- [Grade 5 Social Studies EGLCEs](#)

**English Language Arts (ELA)**

- [Grade 2](#)
- [Grade 3](#)
- [Grade 4](#)
- [Grade 5](#)
- [Grade 6](#)

**Mathematics**

- [Grade 2](#)
- [Grade 3](#)
- [Grade 4](#)
- [Grade 5](#)
- [Grade 6](#)

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 13: School Calendar 2015-2016



# CAREER ACADEMY / SUCCESS ACADEMY | 2015-2016 CALENDAR

- 3-7 Teacher & Staff Orientation
- 17 First Day of School
- 26 Early Dismissal 2pm - PD

AUGUST 2015						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

FEBRUARY 2016						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

- 10 Teacher PD – No School Students
- 15 Presidents' Day – No School Offices Closed
- 19 Progress Reports
- 24 Early Dismissal 2pm – PD

- 7 Labor Day – No School Offices Closed
- 9 Early Dismissal 2pm – PD
- 23 Early Dismissal 2pm – PD

SEPTEMBER 2015						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

MARCH 2016						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

- 9 Early Dismissal 2pm – PD
- 23 Early Dismissal 2pm – PD
- 25 Good Friday – No School Offices Closed
- 28 No School for students Records Day

- 7 Early Dismissal 2pm – PD
- 21 Teacher PD – No School Students
- 26 No School for students Records Day
- 28 Progress Reports
- 29 Early Dismissal – Parent Teacher Conference
- 30 Early Dismissal – Parent Teacher Conference

OCTOBER 2015						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

APRIL 2016						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

- 4-8 Spring Break – Offices Closed
- 11 Classes Resume
- 13 No School – Parent Teacher Conference
- 27 Early Dismissal 2pm – PD

- 4 Early Dismissal 2pm – PD
- 18 Early Dismissal 2pm – PD
- 25 Early Dismissal
- 26-27 Thanksgiving Break – No School Offices Closed

NOVEMBER 2015						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

MAY 2016						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- 6 Progress Reports
- 11 Early Dismissal 2pm – PD
- 14 Senior Prom
- 25 Early Dismissal 2pm – PD
- 30 Memorial Day – No School - Offices Closed – Invitation to participate in Memorial Day Parade

- 2 Early Dismissal 2pm – PD
- 16 Early Dismissal 2pm – PD
- 18 Progress Reports
- 21-31 Winter Break – No School Offices Closed

DECEMBER 2015						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JUNE 2016						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- 7 Final Exams 1,3,5,7 Periods
- 8 Final Exams 2,4,6,8 Periods
- 10 Last Day of School – Early Dismissal
- 11 Graduation
- 20 1st Day of Summer School CASB

- 1 New Year's Day – No School Offices Closed
- 4 Classes Resume
- 12 Final Exams 1,3,5,7 periods
- 13 Early Dismissal 2pm – PD
- 14 Final Exams 2,4,6,8 periods
- 15 End of 1st Semester
- 18 M.L. King Day – No School Offices Closed
- 27 Early Dismissal 2pm – PD

JANUARY 2016						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JULY 2016						
S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- 4 Independence Day – No School Offices Closed
- 11 Last Day of Summer School

1st Grading period 8/17 thru 10/23 - Progress Reports 10/28  
 3rd Grading Period 1/18 thru 3/28 - Progress Reports 2/19  
 Total Student Days: 188

2nd Grading period 10/27 thru 1/15 - Progress Reports 12/18  
 4th Grading Period 3/29 thru 6/10 - Progress Reports 5/6  
 Total Teacher Days: 203

Career Academy of South Bend Application to Education One, LLC (Trine University)  
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Attachment 14: Enrollment Policy

SASB follows the legal requirement, IC 20-24-5-4, that a charter school may not establish admission policies or limit student admissions in any manner in which other public schools are not permitted to establish admission policies or limit student admissions.

As authorized by IC 20-33-8-30, SASB reserves the right not to admit students who have been expelled from another school or who have withdrawn from another school to avoid expulsion or disciplinary action. In accordance with IC 20-33-8-30(b), such students may enroll in another school (any public school, including a charter) only if the student's parents inform the new school of the expulsion (or withdrawal to avoid expulsion) and the new school consents to the enrollment. SASB will require a written disclosure from parents of students who have been enrolled at other schools of disciplinary actions at the prior school. Consent to enrollment is conditioned on the accuracy of such disclosure. In any case in which consent to enrollment is withdrawn, SASB will comply with the requirement of IC 20-33-8-30(d) to provide an opportunity for an informal meeting with the principal.

Preference for enrollment will be given, as allowed by law, IC 20-24-5-5(c), to students who attended the school previously and their siblings.

Subject to such preference, SASB will enroll students in chronological order, based on the date of submission of a complete enrollment package including records from the student's prior school (if any), until the capacity for each grade is reached. In order to retain openings available for siblings of other SASB or CASB students, open enrollment for a grade will be suspended and a waiting list established when enrollment reaches 80% of capacity; enrollment may thereafter be reopened (with preference based on order on the waiting list) depending on the number of students enrolled under the sibling preference. Standing on the waiting list will be based on chronological order of submission of a complete enrollment package, and to the extent that openings become available, students on the waiting list will be offered the opportunity, during a specified time, to enroll for the open seat. If a family receiving such an offer does not enroll the child as SASB within the specified time, the family will be considered as having waived the potential right of enrollment, and the school will offer the seat to the next family on the waiting list.

SASB will not use a lottery for allocating enrollment.

Career Academy of South Bend Application to Education One, LLC (Trine University)  
 Application for Success Academy of South Bend

Attachment 15: Discipline Policy

SASB’s discipline policy will be based on Positive Behavior Support as described at page 22 and Appendix 4 (pages 23-24) of the Project Narrative. Behavior categories and responses are as follows:

Level One Behaviors

Definition	Examples	Possible Responses
Behaviors that: <ul style="list-style-type: none"> <li>Do not significantly violate the rights of others</li> <li>Do not endanger the safety of self or others</li> <li>Do not appear to be chronic</li> <li>Do not require administrative involvement</li> </ul>	<ul style="list-style-type: none"> <li>Academic dishonesty</li> <li>Classroom disruptions</li> <li>Dishonesty</li> <li>Dress code violations</li> <li>Forgery/deception</li> <li>Horseplay</li> <li>Insubordination/disrespect</li> <li>Possession or use of electronic equipment</li> <li>Public display of affection</li> <li>Unauthorized presence in unsupervised areas</li> </ul>	<ul style="list-style-type: none"> <li>Correct behavior</li> <li>Class time-out</li> <li>Community circle</li> <li>Discussion with peers</li> <li>Parent/guardian contact</li> <li>Proximity</li> <li>Redirection</li> <li>Responsible behavior plan</li> <li>Restitution</li> <li>Review/teach expected behavior</li> <li>Teacher conference with student</li> <li>Written apology letter</li> </ul>

Level Two Behaviors

Definition	Examples	Possible Responses
Behaviors that: <ul style="list-style-type: none"> <li>Are chronic level one behaviors</li> <li>Violate the rights of others</li> <li>May endanger the safety of self or others</li> <li>Requires administrator involvement</li> </ul>	<ul style="list-style-type: none"> <li>All level one behaviors when chronic</li> <li>Extortion</li> <li>Gang-related activity</li> <li>Inappropriate gesture/language</li> <li>Libel and slander</li> <li>Obscenity</li> <li>Provocation</li> <li>Tobacco violation</li> <li>Vandalism/theft</li> </ul>	<ul style="list-style-type: none"> <li>Inform student of violation</li> <li>Complete appropriate documentation</li> <li>Contact local agencies that can provide support</li> <li>Loss of privilege</li> <li>Class time out</li> <li>Detention</li> <li>Positive behavior support plan</li> <li>Parent/guardian contact</li> <li>Referral to RTI team</li> <li>Referral to counselor</li> <li>Reteach appropriate behavior</li> <li>Restitution</li> </ul>

### Level Three Behaviors

Definition	Examples	Possible Responses
<p>Behaviors that:</p> <ul style="list-style-type: none"> <li>• Are chronic level two behaviors</li> <li>• Violate district or state policies or laws</li> <li>• Endanger the safety of self or others</li> <li>• Requires administrator involvement and possible external assistance</li> </ul>	<ul style="list-style-type: none"> <li>• Arson</li> <li>• Bomb threat</li> <li>• Bullying, intimidation or harassment</li> <li>• Drug/alcohol violation</li> <li>• Drug paraphernalia</li> <li>• False alarm</li> <li>• Fighting</li> <li>• Possession or use of tobacco products</li> <li>• Threats or attacks against others</li> <li>• Technology-related offenses               <ul style="list-style-type: none"> <li>○ Cyberbullying</li> <li>○ Digital images</li> <li>○ Sexting</li> </ul> </li> <li>• Unlawful activity</li> <li>• Vandalism/theft (felony)</li> <li>• Weapons/explosives</li> </ul>	<ul style="list-style-type: none"> <li>• Complete appropriate documentation</li> <li>• Contact local agencies</li> <li>• In-school suspension</li> <li>• Out-of-school suspension</li> <li>• Expulsion</li> <li>• Crisis screening</li> <li>• Parent/guardian contact</li> <li>• Parent/administrator student conference</li> <li>• Positive behaviors support plan</li> <li>• Functional Behavior Assessment (FBA)</li> <li>• Referral to RTI team</li> </ul>

SASB's discipline policy will be applied in conformance with state law, including the following:

**20-33-8-14. Grounds for suspension or expulsion.**

(a) The following are the grounds for student suspension or expulsion, subject to the procedural requirements of this chapter and as stated by school corporation rules:

- (1) Student misconduct.
- (2) Substantial disobedience.

(b) The grounds for suspension or expulsion listed in subsection (a) apply when a student is:

- (1) on school grounds immediately before or during school hours, or immediately after school hours, or at any other time when the school is being used by a school group;
- (2) off school grounds at a school activity, function, or event; or
- (3) traveling to or from school or a school activity, function, or event.

**20-33-8-15. Suspension/expulsion for unlawful activity on or off school grounds.**

In addition to the grounds specified in section 14, a student may be suspended or expelled for engaging in unlawful activity on or off school grounds if:

- (1) the unlawful activity may reasonably be considered to be an interference with school purposes or an educational function; or
- (2) the student's removal is necessary to restore order or protect persons on school property; including an unlawful activity during weekends, holidays, other school breaks, and the summer period when a student may not be attending classes or other school functions.

**20-33-8-16. Expulsion for firearms, destructive devices, or weapons.**

- (a) As used in this section, "firearm" has the meaning set forth in IC 35-47-1-5.
- (b) As used in this section, "deadly weapon" has the meaning set forth in IC 35-31.5-2-86. The term does not include a firearm or destructive device.
- (c) As used in this section, "destructive device" has the meaning set forth in IC 35-47.5-2-4.
- (d) Notwithstanding section 20 [IC 20-33-8-20] of this chapter, a student who is:
- (1) identified as bringing a firearm or destructive device to school or on school property;
- or
- (2) in possession of a firearm or destructive device on school property;
- must be expelled for at least one (1) calendar year, with the return of the student to be at the beginning of the first school semester after the end of the one (1) year period.
- (e) The superintendent may, on a case by case basis, modify the period of expulsion under subsection (d) for a student who is expelled under this section.
- (f) Notwithstanding section 20 of this chapter, a student who is:
- (1) identified as bringing a deadly weapon to school or on school property;
  - (2) in possession of a deadly weapon on school property;
- may be expelled for not more than one (1) calendar year.
- (g) A superintendent or the superintendent's designee shall immediately notify the appropriate law enforcement agency having jurisdiction over the property where the school is located if a student engages in a behavior described in subsection (d). The superintendent may give similar notice if the student engages in a behavior described in subsection (f). Upon receiving notification under this subsection, the law enforcement agency shall begin an investigation and take appropriate action.
- (h) A student with disabilities (as defined in IC 20-35-7-7) who possesses a firearm on school property is subject to procedural safeguards under 20 U.S.C. 1415.

**20-33-8-19. Expulsion meeting -- Notice of right to request and appear -- Appeal - Forfeiture of rights.**

- (a) A superintendent of a school corporation may conduct an expulsion meeting or appoint one (1) of the following to conduct an expulsion meeting:
- (1) Legal counsel.
  - (2) A member of the administrative staff if the member:
    - (A) has not expelled the student during the current school year; and
    - (B) was not involved in the events giving rise to the expulsion.
- The superintendent or a person designated under this subsection may issue subpoenas, compel the attendance of witnesses, and administer oaths to persons giving testimony at an expulsion meeting.
- (b) An expulsion may take place only after the student and the student's parent are given notice of their right to appear at an expulsion meeting with the superintendent or a person designated under subsection (a). Notice of the right to appear at an expulsion meeting must:
- (1) be made by certified mail or by personal delivery;
  - (2) contain the reasons for the expulsion; and
  - (3) contain the procedure for requesting an expulsion meeting.
- (c) The individual conducting an expulsion meeting:
- (1) shall make a written summary of the evidence heard at the expulsion meeting;
  - (2) may take action that the individual finds appropriate; and
  - (3) must give notice of the action taken under subdivision (2) to the student and the student's parent.
- (d) If the student or the student's parent not later than ten (10) days of receipt of a notice of action taken under subsection (c) makes a written appeal to the governing body, the

governing body:

**(1)** shall hold a meeting to consider:

**(A)** the written summary of evidence prepared under subsection (c) (1); and

**(B)** the arguments of the principal and the student or the student's parent;

unless the governing body has voted under subsection (f) not to hear appeals of actions taken under subsection (c); and

**(2)** may take action that the governing body finds appropriate.

The decision of the governing body may be appealed only under section 21 [IC 20-33-8-21] of this chapter.

**(e)** A student or a student's parent who fails to request and appear at an expulsion meeting after receipt of notice of the right to appear at an expulsion meeting forfeits all rights administratively to contest and appeal the expulsion. For purposes of this section, notice of the right to appear at an expulsion meeting or notice of the action taken at an expulsion meeting is effectively given at the time when the request or notice is delivered personally or sent by certified mail to a student and the student's parent.

**(f)** The governing body may vote to not hear appeals of actions taken under subsection (c). If the governing body votes to not hear appeals, subsequent to the date on which the vote is taken, a student or parent may appeal only under section 21 of this chapter.

Research shows that the number one predictor of success is the ability to regulate our own emotions. Teachers will therefore promote students' awareness of core social and emotional competencies for successful student performance. Social and emotional skills play a role in determining how well equipped children are in meeting the demands of the classroom. SASB will help children and their parents acquire the knowledge, attitudes, and skills they need to recognize and manage their emotions, demonstrate caring and concern for others, establish positive relationships, make responsible decisions, and handle challenging situations constructively.

Unmanaged stress and poor regulation of impulses interfere with attention and memory and contribute to challenging, disruptive classroom behaviors. Learning--and success in life--is an intrinsically social and interactive process that takes place with teachers, peers, and the support of one's family. Therefore, the ability to recognize and manage emotions and establish and maintain positive relationships impacts both preparation for learning and the ability to benefit from learning opportunities

Students may be suspended for Level Two or Level Three behaviors and may be expelled for Level Three behaviors. Students must be expelled for firearms and related offenses as described in IC 20-33-8-16.

SASB's disciplinary practice will be modified for students with disabilities in accordance with Indiana Administrative Code Title 511, Article 7, Chapter 44, e.g., behavior which is a manifestation of a student's disability may not be the basis for a change in placement as defined by 511 IAC 7-42 (removal for more than ten consecutive instructional days or as part of a series of removals for related behavior totaling more than ten instructional days in a school year), 511 IAC 7-44-5(e). Additionally, although not required by law, after five days of out of school suspension for a special education student or a student with a Section 504 plan, a Functional Behavior Assessment (as defined by 511 IAC 7-32-41) will be prepared if one does not already exist, or if an FBA already exists, it will be updated and a behavioral intervention plan for the student will be implemented.

The appeal process for students facing expulsion will be in accordance with IC 20-33-8-19. The CAN superintendent may conduct the meeting or appoint the principal or other staff member to conduct the meeting in accordance with IC 20-33-8-19(a). The school's board of directors has voted not to hear appeals of expulsion decisions.

Parents will be informed of the school's discipline policy by publication of the policy on the school's website with a link to that page of the website to be included in the student handbook and the School Education Agreement signed by each student and parent, see Attachment 1 to Appendix 4 above.

Career Academy of South Bend Application to Education One, LLC (Trine University)  
 Application for Success Academy of South Bend

Attachment 16: Evidence of Demand/Support from Community

	Source	Comment
1	Brian Collier, Ph.D., University of Notre Dame	Sharing teaching expertise
2	Goodwill Industries of Michiana	Opening adult high school, leading charity, <a href="http://www.goodwill-ni.org/">http://www.goodwill-ni.org/</a>
3	HealthWorks Kids Museum	Children's education leader
4	Regina Emberton, Michiana Partnership	Economic development area leader
5	Keith Walatka, Beacon Resource Center	Will enroll child at SASB
6	Sam Centellas, La Casa De Amistad	A key area Hispanic organization
7	Patrick Perri, Heroes Camp	After-school program provider, thanks for CASB's support of its programs
8	Kim Haughee, Children's Dyslexia Center	Providing training to CASB in Orton-Gillingham reading program
9	Terry McBride, Michiana Youth Ministries	Area youth-service leader
10	Louie & Generosa Sanchez	Parents of CASB students appreciative
11	Heather Kaiser	Parent of older CASB student seeking similar opportunity for younger child
12	Michelle Witt	Parent of CASB student expressing thanks for her child's experience there
13	Mara Lulu	Parent of older CASB student seeking similar opportunity for younger child
14	Roger Laidig, Oaks at Southpaw Farm	Point of Light Ministries retreat leader, participant in CASB "Challenge Day"
15	Iris Hammel, St. Joe CEO Program	Director of entrepreneurial education program
16	Jackie Walorski, Congressional Rep, Ind Dist 2	District's U.S. Congress Representative
17	Dale DeVon, Indiana House Rep, Distict 5	District's Indiana Legislature Rep
18	Northern Indiana Workforce Board	Education/workforce development leader with extensive experience with CASB
19	St. Joseph County Chamber of Commerce	Support of CASB's PLTW program
20	St. Mary's College	Professor/social work sees need in area
21	IN*SOURCE special education program	Appreciation for CASB special ed program
22	Memorial Hospital of South Bend	Recognizing CASB reputation for staff member commitment & innovative curriculum





Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

April 22, 2015

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools.

I personally believe all children need access to a school that fits them well and certainly the Career Academy and its related schools are filling a much needed niche in our community.

Professionally, I'm pleased to write this letter of support because the teachers from Career Academy have been quick to share their expertise with my students here at the University of Notre Dame. In particular, we've placed student teachers with teachers from the Career Academy and I've also asked their faculty to help present to graduate students at Notre Dame and they've always been keen to help. Lastly, we hope to establish opportunities for our Education, Schooling, and Society Minor to learn more about alternative forms of schooling in our area through work at the Career Academy.

In short, the Career Academy is not just serving K-12 students but also offering educational experiences to undergraduates and graduate students in the area too.

I'd be happy to answer any questions about our relationship with the school. I'm available at: 574.850.7166 or Brian.Collier@nd.edu.

Sincerely,

Brian S Collier, Ph.D.



1805 Western Ave • P.O. Box 3846 • South Bend, IN 46619  
Phone (574) 472-7300 • FAX (574) 472-7301

Deble M. Coble,  
President/CEO

April 29, 2015

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

Goodwill Industries of Michiana has witnessed the positive impact that the Career Academy is having on the children and families of Michiana. We firmly believe that the innovative and relevant approach to education is making a difference in our community, and would encourage you to partner with the Academy in this endeavor.

Sincerely,

Guy A. Fisher  
Vice President of Mission Advancement



Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola , Indiana 46703

April 23, 2015

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

I am an RN and licensed teacher and I serve as the Program Development Specialist with Memorial's HealthWorks! Kids' Museum. HealthWorks! is a hands on interactive health education center and museum that specializes in providing health programs for students in pre-school through the sixth grade. HealthWorks! is owned and operated by Memorial Hospital, also in South Bend. Memorial created and supports HealthWorks! as an investment in the health and well being of our community's children. Memorial is dedicated to improving the quality of life for people though out the 'Michiana' region, and therefore finds abundant common ground with The Career Academy South Bend and the upcoming Success Academy. The forward- thinking and 'can do' mindset, out of the box strategies, continuous improvement and sincere dedication toward providing children and young people with the best possible education resonate with the values of HealthWorks! and Memorial and are a great asset to our community. We believe a young person's experiences and feelings toward school have a huge impact on their overall development, health, and their future. The ability of the South Bend Career Academy and Success Academy to provide children and teens with a positive educational experience helps the entire community.

In addition, I am the parent of an eight year old, and it is very encouraging to see high quality programs such as the South Bend Career Center and Success Academy taking root in South Bend. I can speak from experience when I state that education is a huge concern for my husband and I and most of the local parents we know, and there are limited options in our city. All parents want the best for their children and it is exciting to see the development of such high quality options in our community. I believe the Career Academy of South Bend and the Success Academy will actually prevent families with school aged children from moving out of South Bend in search of a better school district.

Thank you for considering adding the South Bend Career Academy and Success Academy to the charter schools under Trine University's authorization. I believe both are strong, well-backed organizations that benefit our citizens and community in many ways.

Sincerely,

Rebecca Zakowski



South Bend Airport Office  
4477 Progress Drive  
South Bend, IN 46628

574.400.5432  
MichianaRegion.com

April 23, 2015

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

While the Michiana Region has much to offer companies, we believe our most important asset is a large, highly skilled and motivated workforce. We keep that workforce knowledgeable and armed with the skills needed by today's employers through a strong network of K-12 and higher education providers. Opportunities for children to engage in programs such as the Success Academy are important to our region's workforce development efforts, which in turn is a key factor in the economic success of our region.

The Success Academy program is a clear demonstration to prospective employers of our commitment to educate all of our children and develop the quality workforce that they will need in the future.

Please do not hesitate to contact me with any questions.

Best regards,  
**MICHIANA PARTNERSHIP**

A handwritten signature in cursive script that reads 'Regina Emberton'.

Regina Emberton, CCIM, SIOR  
President

# The Beacon

*Partnering together to bring  
transformation in everyday life.*

The Beacon Resource Center, Inc  
4210 Lincoln Way West  
South Bend, IN 46628  
www.thebeacon.cc  
574-807-1566

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

4/22/15

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am writing to share our organization's support and excitement for the Career Academy South Bend (CASB). CASB has been a strong community partner that we have seen make great inroads into our community as well as be a generous partner. They have been a true blessing to South Bend.

I am writing to support the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. Specifically, the opportunity of having CASB adding a K-6 center (Success Academy) will really deepen and expand the great work CASB is doing.

I personally am excited about sending my kid(s) to the Success Academy and CASB. Their approach to education and community engagement really resonates with my wife and I.

Please don't hesitate to contact me with any follow-up questions,

Sincerely,

Keith Walatka  
President of the Board, The Beacon



April 20<sup>th</sup>, 2015

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to their strategic plan for expansion to better serve youth in our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools.

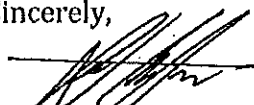
We are specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy. We have reviewed the plans and followed their progress and are excited about this additional opportunity for children in our community.

We have enjoyed being partners with the Career Academy and appreciate the hard work and commitment they have shown to offer a quality educational environment for our youth.

If you have questions about this letter, or the relationship between the Career Academy and La Casa de Amistad please call me at 574.233.2120 or send me an email to: [sam@lacasadeamistad.org](mailto:sam@lacasadeamistad.org)

Thank you and have a great day,

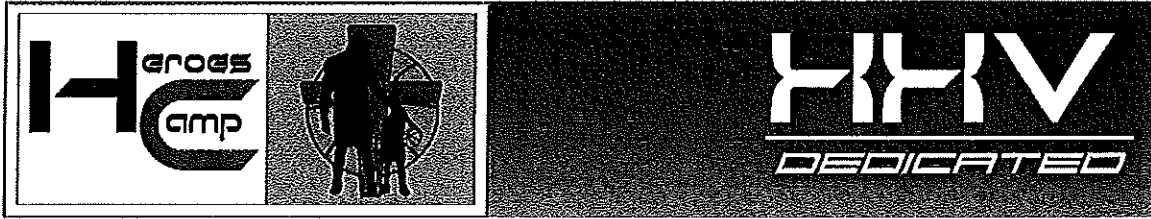
Sincerely,



Sam Centellas  
Executive Director

**OUR MISSION**

To empower the Latino/Hispanic community within Michiana by providing educational, cultural and advocacy services in a welcoming, bilingual environment.



*Serving the community for 25 years. Dedicated to the Development of the Spirit, Soul, & Body*

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola , Indiana 46703

March 22, 2015

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. We work side by side with many of the same children and see a notable difference in our children that attend Career Academy versus those that do not. Being an after school program we provide excellent care for the children but realize we need the help and support of organizations like Career Academy that are also influencing our children throughout the school day. They have been a huge team player for our program when our facility was hit by a tornado. For six months they hosted us in their gym free of charge because they value the region they are a part of and the initial investment we already have in these young ones. We are grateful for their partnership and the way they display a commutative effort to affect change in our city. We believe in the success of their programming and would love to see it continue to expand in statue and land.

Respectfully,

A handwritten signature in black ink, appearing to read 'Patrick Perri III'.

Patrick Perri  
Director

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

I am currently preparing to provide professional training for the faculty and staff of Career Academy South Bend and the new K-6 Success Academy. The training is *Orton-Gillingham*, an IMSLEC accredited clinical model that incorporates the latest scientific research in the field of reading and spelling education. This training has been made available to children in the South Bend area through the South Bend Valley of the Scottish Rite Masons. Their goals are to provide tutoring for children with dyslexia and related language disorders, to provide training for a growing body of highly skilled educators, and to contribute to clinical research.

Longitudinal analysis revealed significant gains for all measures of reading abilities, (WRMT-III, TWS-4, TOWRE-2, CTOPP-2). Students receiving this explicit instruction showed significant growth in all areas of reading and writing skills: word identification, word attack, comprehension, fluency, and spelling. Standard scores indicated an average growth of 10 standard points over a 2-year period. These findings support the use of sequential, multisensory phonics-based programs in remediating reading difficulties, regardless of diagnosis or cognitive profile.

According to the National Center for Educational Statistics, U.S. Department of Education and Indiana Department of Education, the South Bend Community School Corporation ranks 295<sup>th</sup> out of 314 Indiana schools. The crime rate involving juveniles continues to rise in our area. It has become evident that an alternative educational approach and environment is needed to yield a positive change for students, their families, and the South Bend Community.

The Children's Dyslexia Center of South Bend Board of Governors, tutors, and trainers fully support the efforts of the Career Academy and the new Success Academy as they continue to improve the educational outcomes of children in our area.

Sincerely,

Kim Haughee, Director & Trainer  
M.A.E.  
CALT/ALTA  
ICALP/ALTA





April 21, 2015

*Michiana Youth  
Ministries  
Board of Directors*

*President  
Jon Badur*

*Executive Director  
Rev. Terry McBride*

*Vice President  
Todd Zeiger*

*Treasurer  
Mike Reichmann*

*Secretary  
Jenny Hall*

*Board  
Jan Fye  
Tim Grey  
Sarah Keel*

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Avenue  
Angola, Indiana 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

I believe that Career Academy South Bend offers a positive and safe environment in which middle school and high school students can excel in both academic studies and character development.

I am especially excited to see what a difference the new Success Academy can do for kindergarten through sixth graders because so many of the issues that teenagers struggle with can be traced back to their developmental years during elementary school. As the staff of Success Academy cares for, teaches and inspires younger children the way they do for the teenagers at Career Academy, they will go along way toward setting them on a path for a better and more fulfilling life.

I hope and pray that you will give their petition every consideration and support them in this important endeavor.

Sincerely,

Terry McBride, Director  
Michiana Youth Ministries

3.30.14

We are parents in strong support of SBCA adding 5<sup>th</sup> & 6<sup>th</sup> grades.

When our boys started school, we sent them to a Christian private school because of the negative information we heard about the public school in our area. Until, the economy went down and our job was affected which forced us to send our boys to public school. My oldest son was accepted through a magnet program in Washington High school so he survived it. But he would always complain about the "student's mischievous behavior" that bothered him at first. But after a number of conversations explaining, praying and guiding him, he finally was able to focus and graduated high school.

My other 2 sons were at Clay Intermediate & Clay HS. They didn't have a good experience at either. My one son witnessed a fist fight and ongoing brawling in the hallway. There was a time that he was scared to go to school. Then my middle child was involved with some really bad peers and had a devastating influence on him.

That's when we decided to find a new school for my boys. We heard over the radio (WFRN) about the South Bend Career Academy as some teachers were being interviewed and we were just so thrilled to know how they loved to teach there. And so we immediately inquired of the school. Their Leaders and teachers were wonderful. They have the same vision as we have as parents for the students, preparing the students with real world work skills and exposing them to different kinds of careers so the students would actually experience the "job." I know there are still students that can't decide what to do in college, but SBCA helps and encourage them to make a choice and hopefully decide what course to take in college. We are grateful to SBCA Team Leaders because of their dedication to education!

After our experience with area South Bend schools, the need for 5<sup>th</sup> & 6<sup>th</sup> grade at SBCA as an option on the northwest side of South Bend cannot be overstated.

Gratefully,

Louie & Generosa Sanchez  
17835 Cleveland Road  
South Bend, IN 46635

## Parent Letter for Evaluation Committee:

I would like to express my interest in seeing the South Bend Career Academy add grades 5 and 6 to our school. I firmly believe there is a need and that the addition of these two grades would benefit our community and many families greatly.

I have a child enrolled in 7<sup>th</sup> grade at SBCA and it has been such a privilege to witness her growth through the education you have provided. She previously attended South Bend Public Schools through 6<sup>th</sup> grade and in the South Bend Public Schools, middle school starts at 5<sup>th</sup> grade. That is a hard transition in itself for many children at that age considering many of them have recently turned 10. I felt the transition went much more smoothly than I anticipated at first, however, I quickly realized that her academic progress was no longer based on her individual ability in a particular subject and that she would not be placed in certain classes based on how well she was doing in a subjects until the following year. This is hard on teachers as well as students especially when there are 30 or more kids at different learning levels within a class.

I also realized there was a real struggle with effective discipline in her environment and a lack of administrative support to handle the issues. Traditional public schools are faced with receiving poor scores from the state if they are sending kids home on suspension, seem to be disciplining more kids from one race or another and so on and so forth. Kids end up getting away with a lot and sitting in the office before returning to class to cause more issues. That sort of environment made it feel unsafe for our child at school, disrupted class, made her afraid to eat lunch in the cafeteria and caused repeat visits to the school counselor, or nurse for not feeling well because of how someone had treated her or because the teachers became stressed and began yelling daily.

These issues are not the same for all children and they are not necessarily every public schools problems, but I do know I was not the only parent who felt this way and our child was not the only student struggling. When we could not get answers or evoke change in her school I wanted another option.

I now find myself in a similar situation with my son who attends second grade at Marquette Montessori Academy. It is an amazing elementary program through South Bend Public Schools which sadly will end at 4<sup>th</sup> grade. I cannot imagine sending my son into the same middle school situation that we faced with my daughter. So many parents at Marquette are concerned with what they will face after 4<sup>th</sup> grade that they have all petitioned the board and South Bend School Corporation to extend the school through 5<sup>th</sup> and 6<sup>th</sup> grades. We have held fundraisers and approached the board numerous times regarding this desire. I am not the only parent who wants other options for my child and Marquette Montessori is not the only school who has passionate parents looking for alternatives.

Even if the South Bend Community School Corporation did extend Marquette through 6<sup>th</sup> grade, I have to admit if given the option I personally would want my child to attend South Bend Career Academy as soon as possible. SBCA offers an education where my children are encouraged to "learn themselves" as well as academics. SBCA knows each child has strengths and weaknesses and a desire to learn. When you provoke that curiosity as your school does and offers the opportunity to explore those options as your school does, then the sky is the limit. You can't NOT learn who you are and who you want to be at SBCA.

Middle school is the time in a child's life when they begin to become aware of themselves and face insecurity. If SBCA could reach these kids at their most influential point in their lives, what an impact we could make on who they choose to become and the goals they will set for themselves. The doors would only open that much wider to their future. I want that for my son, I have seen what you have provided my daughter, and I know other parents want this too. Please consider expanding our school and providing the change our children need.

Heather Kaiser  
Career Academy Parent

Spa Specialist- The Hot Tub Company  
3509 N Grape Rd  
Mishawka, In 46545  
574-257-7727  
574-257-7760 Fax

4/3/14

**BALL STATE review committee**

I would like to express my support as a parent of a Senior at the South Bend Career Academy, in the upcoming addition of 5th and 6th graders to the school. I feel that 5th grade is a perfect transitional time to add such students to this program, especially in South Bend. The Career Academy offers so many opportunities to their students that would be beneficial to children in these grades.

After losing her father a year and a half ago, Ariella struggled to find the kind of support she needed in her other area school. When she was at a critical point in her own journey, I enrolled her at Career Academy. She found immediate care and flourished interpersonally and academically. In fact, she found her voice again and recently placed 2nd at the State level J.A.G. competition for writing. Her receiving the award from Governor Pence is a highlight of high school Ariella will long remember. Ariella is now receiving a significant scholarship from Seton Hall and will be attending this coming Fall.

The students of South Bend need the unique individual approach of SBCA as young as possible.

Thank you,  
Michelle Witt

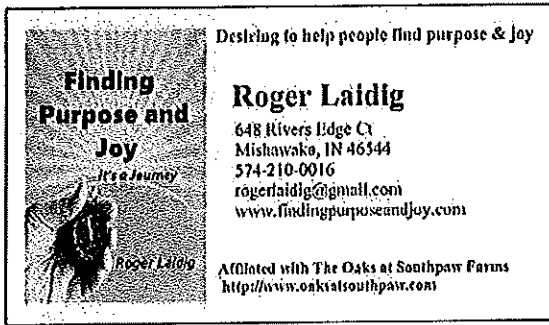
To Whom This May Concern,

In December 2011, we were looking for a place for my then 6th grader to attend. He had been attending Dickinson but they could not meet his needs as a high achiever. We took him out of that school about 3 weeks into the school year and homeschooled him through K12 Hoosier Academy. While he excelled at that, he really missed being with other kids so when we heard about SBCA, we decided to tour it. We were so impressed by what we saw, my 8th grade son decided to withdraw from LaSalle and start SBCA 2nd semester. My eldest daughter, Jocelyn, really wanted to attend but she was a Junior and at the time the grades there were 7th through 9th so she was too old. If there had been 6th grade, Adam would have started then, also, but he had to wait until 7th. We told one of his friend's parents about the school and they toured and also loved it. Both Adam and his friend started last year to great success. This year, Adam, was able to skip a grade and is now in 9th grade. Also, this year, my youngest, Sara entered 7th grade at SBCA and another daughter, Kelsey, transferred from Clay High School for her Senior year. All the kids have excelled at SBCA. There are great opportunities and great teachers at this school.

Our public schools here in South Bend are set up in Kindergarten through 4th, 5th through 8th and then high school. If SBCA is granted their petition to have 5th and 6th graders then parents in our area would have a great choice coming out of elementary school. It is harder to leave a middle school after 6th grade since they already know their school and friends.. The kids would benefit greatly from dedicated staff who know them by name, the project based learning model and being able to learn advanced technology needed in today's market. This would be an asset to the parents in South Bend as well as their children.

Sincerely,  
Mara Lula

Received by CASB: April 4, 2014



April 22, 2015

Ms. Lindsay Omlor, Director of Charter Schools  
Trine University  
One University Ave  
Angola, Indiana 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

I am writing this as a result of my visit with the administrators of Career Academy and the tour that they gave me. In addition, I personally was involved as a day mentor for their student 'life purpose' day known as Challenge Day. I am very impressed with their approach to educating their students not only in book knowledge but also in life skills. It was obvious that their primary interest and focus is helping their students become successful in all aspects of life.

Regards,

*Roger*

Roger Laidig  
Chairman of the Board of Directors of The Oaks at SouthPaw Farm  
<http://www.oaktsouthpaw.com>  
574-210-0016  
rogerlaidig@gmail.com  
[www.findingpurposeandjoy.com](http://www.findingpurposeandjoy.com)

*"Desiring to help people find purpose and joy in life"*

Iris Hammel  
St. Joe CEO  
Program Director  
726 Cherry Tree Lane  
South Bend, IN 46617

April 28<sup>th</sup>, 2015

Ms. Lindsay Omlor  
Director of Charter Schools  
Trine University  
One University Ave  
Angola, IN 46703

Dear Ms. Omlor & Trine Charter School Authorization Team,

I am contacting you on behalf of Career Academy South Bend relative to the positive plan for expansion to better our community. I am writing in support of the relationship of Trine University as Charter School authorizer for Career Academy South Bend and related schools. I am specifically supportive of the new K-6 opportunity for the South Bend area in the form of the Success Academy.

As program director for St. Joe CEO I am in constant contact with area business and education leaders throughout St. Joseph County. There is a great need for another option in South Bend for K-6 education. I have worked directly with the Career Academy South Bend and am impressed with their forward vision and movement on making that vision a reality. This type of leadership is imperative if we want to improve the quality of life in our community. South Bend is a community that is on the move and is working hard on many fronts to become a thriving place for businesses to grow. We need the education options in this city to match that movement and I believe the Success Academy is the answer.

Regards,

Iris Hammel



JACKIE WALORSKI  
2ND DISTRICT, INDIANA

419 CANNON HOUSE OFFICE BUILDING  
WASHINGTON, DC 20515  
(202) 225-3918

202 LINCOLNWAY EAST  
SUITE 101  
MISHAWAKA, IN 46544  
(574) 204-2645

COMMITTEE ON ARMED SERVICES

COMMITTEE ON BUDGET

COMMITTEE ON VETERANS' AFFAIRS

**Congress of the United States**  
**House of Representatives**  
Washington, DC 20515-1402

April 4, 2013

Mr. Paul Schlottman  
Superintendent and School Leader  
South Bend Career Academy  
South Bend, Indiana

Dear Mr. Schlottman


It is with great pleasure that I congratulate South Bend Career Academy's desire to add grades 5 and 6 to the existing grade offering of 7 through 12. South Bend Career Academy provides a vital service to students in our community. This expansion, if permitted, would provide a service that is in great demand.

South Bend Career Academy's program would help meet the diverse needs of the students in the 10 SBCSC intermediate schools currently serving grades 5 - 8; with approximately 2,600 students enrolled as 5th and 6th grade students. Additionally, this expansion of South Bend Career Academy to the 5th and 6th grade would assist the home-school population who statistically begin seeking out other educational options or supplemental education options for their children upon entering middle/intermediate school.

I have witnessed firsthand the academic successes of the South Bend Career Academy regularly. I have absolute confidence that they will deliver the same level of instruction and devotion to this potential new group of students.

I hope that you are successful in obtaining the necessary charter approval, which will provide an essential service to the students of the South Bend Community. If we can offer any further assistance, please never hesitate to reach out to my

Sincerely,



Jackie Walorski  
Member of Congress  
Indiana Second District



STATE OF INDIANA  
HOUSE OF REPRESENTATIVES  
THIRD FLOOR STATE HOUSE  
INDIANAPOLIS, INDIANA 46204

Rep. Dale DeVon  
200 W. Washington Street  
Indianapolis, IN 46204  
317-232-9745  
hd@in.gov

COMMITTEES:  
Education  
Family, Children and Human Affairs  
Utilities and Energy

2014 Interim

Mr. Paul Schlottman  
Superintendent and School Leader  
South Bend Career Academy  
South Bend, Indiana

Dear Mr. Schlottman,

As the state representative for House District 5, and a member of the House Committee on Education, I take a particular interest in the schools of St. Joseph County. I would like to express my support for the addition of grades 5 and 6 to the existing grade offerings at the South Bend Career Academy.

It is my understanding that the South Bend Career Academy has received repeated requests from parents to offer grades 5 and 6. These additional grades would be a natural feed into the school's current grade level format that now begins at grade 7. This addition would allow the Career Academy to have more contact with the student and give them more opportunities to help the student meet all the necessary academic goals.

The South Bend Career Academy has a staff that is passionate about making a positive difference in the lives of students. They seek to create opportunities for career exploration and identification based on student interests. The addition of grades 5 and 6 will help them make a positive impact in the lives of even more students.

Again, I would like to express my support for your endeavor. I hope your school is successful in obtaining the necessary charter approval.

Sincerely,

Dale DeVon  
State Representative  
House District 5



NORTHERN  
INDIANA  
WORKFORCE  
BOARD, INC

**WorkOne**  
*Northern Indiana*  
WHERE BUSINESS FINDS PEOPLE AND PEOPLE FIND JOBS

Friday, April 4<sup>th</sup>, 2014

Ball State University  
Administration Building  
Room 101  
Muncie, IN 47306

Attn: Dr. JoAnn Gora and the Board of Trustees

Respectfully Submitted on behalf of  
the Northern Indiana Workforce Board and  
President/CEO Greg Vollmer by:

*Chuck Knebl,*  
*Communications Manager,*  
*NIWB and WorkOne Region 2,*  
*574-237-9675 ext. 2527*  
[CKnebl@GoToWorkOne.com](mailto:CKnebl@GoToWorkOne.com)  
[www.GoToWorkOne.com](http://www.GoToWorkOne.com)

I would like to offer my wholehearted support to the South Bend Career Academy regarding its proposal to add grades five and six to the academic year beginning in the fall 2014. On a handful of occasions over the last several months, I've had the pleasure of attending events at SBCA, and during these visits I've chatted with staff members and students; I was favorably impressed in each instance.

Yet before discussing my visits to the academy, I'd like to briefly describe some issues impacting the north-central Indiana region. As workforce-development managers, my colleagues and I have observed that negative issues such as crime, poverty, parental dysfunctions, poor nutrition and other issues have affected profoundly significant numbers of boys and girls as young as age 10. WorkOne staff members usually provide counseling to individuals age 16 and older; thus, when workforce counselors seek to help Hooslers, many of them are facing significantly exacerbated negatives that emerged at a young age.

Therefore, on behalf of the Northern Indiana Workforce Board and the WorkOne Region 2 Management Team, I would like to urge approval of the SBCA proposal in order to provide interventions for fifth- and sixth-grade students.

Moreover, I will highlight my visits to the academy and also would like to describe a professional gathering in South Bend that occurred a few years before SBCA was even founded – yet nonetheless provides, I believe, valuable insights into the academy's current request to add fifth- and sixth-grade students.

I worked harmoniously with SBCA staff members to coordinate and hold a press conference and media tour at the school on December 18, 2013, to spotlight two innovative programs in which the academy is participating: "Hire

Technology" (sponsored by Conexus Indiana) and "Jobs for America's Graduates" (sponsored by NIWB and WorkOne Region 2). Three broadcasters from South Bend covered the event and I had opportunities to talk with SBCA staff members Chad Addie, Sarah Fine and Jasen Gibbens.

From my separate discussions with Chad, Sarah and Jasen, a few unifying concepts nonetheless emerged that speak volumes about the academy's staff. Each of them used slightly different language to express two vital concepts:  that each child within SBCA's walls has unique intellectual gifts and academy staff members cherish daily opportunities to guide students toward understanding and expressing their gifts; and  that the academy's project-based learning activities are wonderful tools to foster communication skills, responsibilities and discipline within students.

In another instance, I attended a breakfast meeting in March 2014 at SBCA during which staff members outlined the school's plans to build relationships with businesses and employers in the South Bend area. After these important ideas were discussed, a senior at the academy, Ariella Witt, spoke off-the-cuff about her experiences -- and it was a remarkably heartwarming moment. Although she plans to attend Seton Hall University next fall, Ariella had been attending SBCA for less than a year. The reason behind her relatively short SBCA stay is that she attended a different local school for three years -- until her dad passed away, spurring her outlook and attitudes to nosedive into despair.


Ariella reported that she might have dropped-out if not for SBCA staff members assisting her; in addition, she spoke with poise and depth about the empathy of academy staff members and described the school as "family."

Finally, I'd like to briefly describe a WorkOne-sponsored meeting in November 2007 in South Bend where Saint Joseph County business representatives gathered to hear from a futurist named Ed Barlow. Covering a tremendous amount of ground involving economic competitiveness, including technology, energy production, demographics and other topics, Mr. Barlow also made an observation about interactions between education of middle school-age children and economic development. His observations are the nexus to SBCA's proposal at hand.

Mr. Barlow remarked that companies had been evaluating middle school curriculums in locales that were under consideration for construction of new manufacturing facilities, and that the business executives were keenly interested whether middle school students were being taught STEM subjects in a challenging environment.

I believe SBCA is a fine example that surpasses the threshold Mr. Barlow described, and I offer my support of the academy's proposal to add fifth and sixth grades to their program.

Sincerely,



Gregory P. Walker  
FOR JOSEPH COUNTY



Chuck Knebl  
Communications Manager,  
NIWB and WorkOne Region 2  
851 South Marletta St.,  
South Bend, IN 46601



**ST. JOSEPH COUNTY  
CHAMBER OF COMMERCE**

March 31, 2014

Paul Schlottman  
South Bend Career Academy  
3801 Crescent Circle  
South Bend, IN 46628

Dear Paul,

On behalf of the St. Joseph County Chamber of Commerce, I would like to express my support South Bend Career Academy's plan to expand its programing to include fifth and sixth grade students. Your success with your current program gives me great confidence in your ability to expand the program to include younger students.

As the leading economic development organization for St. Joseph County, we recognize the value of an innovative educational environment in preparing the students of our community for the workforce of the future. Your philosophy to create career pathways driven by the needs of area businesses is a welcome approach. We've seen first-hand the work you do develop student life skills that enforce a strong work ethic. We believe that, together with your work to establish a growing network of business and community partnerships, will help students select an appropriate career for themselves and be a real asset to the local business community.

Our community recognizes your work providing an engaging educational format where students can flourish. We are excited about the things we've seen when we've been on site, in particular the engaging educational format that blends project based learning with real world application.

We have enjoyed working with the Academy on skill-building programs such as Project Lead the Way (PLTW). We believe programs like PLTW will only enhance the strong foundation that will help students develop the skills to meet the needs of area businesses.

The Chamber hopes you are successful in obtaining the charter approval. If there is anything else we can do for you, please contact us.

Sincerely,

Jeff Rea  
President and CEO

  
**SAINT MARY'S COLLEGE**  
NOTRE DAME • INDIANA

April 2, 2014

Mr. Paul Schlottman  
Superintendent and Executive Director  
South Bend Career Academy  
South Bend, Indiana

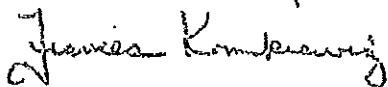
Dear Mr. Schlottman,

I support the addition of grades 5 and 6 to the existing grade offering of 7 through 12 at the South Bend Career Academy. We support the addition of grades 5 and 6 because the Career Academy not only provides a student engaging educational format that blends project-based learning with real world application, but staff would have more interaction with students to help these students meet all the necessary academic goals.

The South Bend Career Academy would also help meet the diverse needs of the students in the 10 SBCSC intermediate schools currently serving grades 5 – 8 with approximately 2,660 students enrolled as 5<sup>th</sup> and 6<sup>th</sup> grade students. This is especially important to me as a social worker.

I hope that you are successful in obtaining the necessary charter approval.

Sincerely,



Frances Bernard Kominkiewicz, Ph.D., M.S.W.  
Professor  
Director, Social Work Program  
Chair, Department of Social Work

Saint Mary's College • Notre Dame, Indiana 46556-5001

Department of Social Work • Telephone (574) 284-4545 • Fax (574) 284-4074

[saintmarys.edu](http://saintmarys.edu)



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**letter of support**

INSOURCE

Rich Burden &lt;rburden@insource.org&gt;

Mon, Mar 31, 2014 at 1:59 PM

To: pschlottman@sbca.in.org

Dear Mr. Schlottman,

This academic year I have had the opportunity to work with your staff in support of three different students facing behavioral challenges. In each case, I was pleased with the way staff was willing to look at each student as an individual attempting to understand unique issues and needs. Because of their openness and diligence, we were able to identify and put in place the appropriate accommodations and services for each student that we believed would help the students better understand and manage their behavior and improve the likelihood of their academic success. With this same commitment to success for all students, IN\*SOURCE supports South Bend Career Academy's petition to add grades 5 and 6 to the existing grade offering of 7 through 12. We believe these newly enrolled students and their families will be appropriately and well served. If or as needed, we will be glad to offer our support.

Best Wishes,

Jane Fuentes

Richard Burden

Program Specialist

Executive Director

Richard Burden

Executive Director

IN\*SOURCE

1703 S. Ironwood Drive

South Bend IN 46613

(574) 234-7101 800 332-4433

[www.insource.org](http://www.insource.org)**CONFIDENTIAL NOTICE**

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# Memorial

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## Hospital of South Bend®

✱ BEACON HEALTH SYSTEM® Care Partner

Mr. Paul Schlottman  
Superintendent and Executive Director  
South Bend Career Academy  
South Bend, Indiana

Dear Mr. Schlottman,

We support the addition of grades five and six to the existing grade offering of seven through twelve at the South Bend Career Academy. The South Bend Career Academy has evidenced much success, including:

- Providing an educational format that engages students by utilizing the concept of project-based learning with practical application to the real world.
- Extending the educational interaction beyond current capacity, encouraging and supporting students to meet and exceed academic goals.
- Repeated requests from satisfied parents to extend the learning opportunities into 5<sup>th</sup> and 6<sup>th</sup> grades.

Additionally, the South Bend Career Academy has a reputation for employing staff committed to providing a positive difference in the lives of youth. The dedicated staff display behavior which indicates they meet each student where they are, accepting the strengths and improvement needs for each individual. The adults then create opportunities for career exploration based upon the expressed interests of each student.

The Academy is establishing a growing network of business and community partnerships to help our youth select an appropriate career for themselves. A curriculum is offered which develops student life skills that enforce a strong work ethic, creates pathways driven by the needs of local business and industry, and is recognized as an innovative engaging educational format where students can flourish through skill-building programs such as Project Lead the Way (PLTW) and Conexus (Advance Manufacturing and Logistics training/certification). It has been recognized by the Indiana Chamber of Commerce.

There is value in providing grades 5 and 6 as a natural transition point for students, helping to meet the diverse needs of 2,660 individuals enrolled in these two grades locally. The Academy offers an alternative education for home-school families and supplemental education options for their children entering middle school.

It is without reservation, that on behalf of Memorial Hospital and the division of Community Health Enhancement, I offer our unreserved support for the successful approval for the charter expansion.

Sincerely,

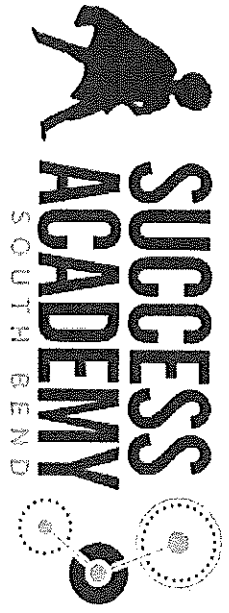
*Margo DeMont, Ph.D.*

Margo DeMont, Ph.D., Executive Director  
Memorial Hospital of South Bend  
Community Health Enhancement

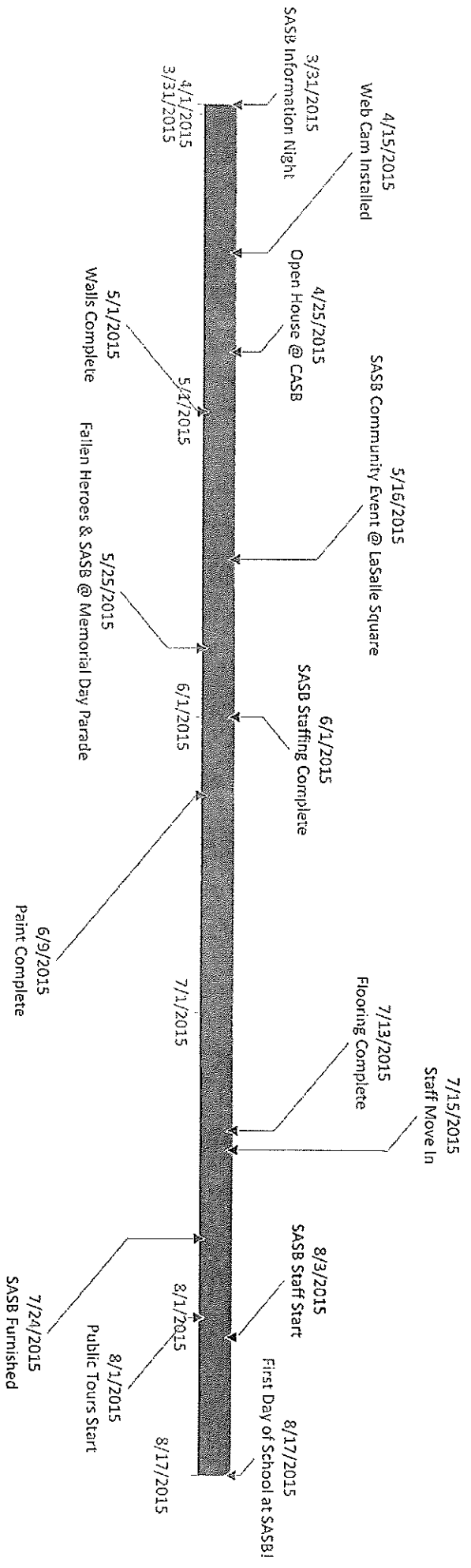


Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 17: Start-Up Plan



# Timeline



Key:  
 Future Student Events  
 Construction Milestones  
 Staff Milestones

SASB Task List April 2015

Due Date	Description	Task Name	Assigned To	% Completed
2/3/2015	Personnel	Post Success Academy Principal	Tami Collins:#38	100.00%
2/4/2015	Marketing / Enrollment	New CASB Website Up and Running	Susan Walterhouse:#39;#Dorian Dickinson (Marketing);#45	100.00%
2/6/2015	Personnel	Schedule Ventures Training	Emily Mares:#42;#Tami Collins:#38	100.00%
2/6/2015	Personnel	Posting Elementary Teaching Positions	Tami Collins:#38	100.00%
2/6/2015	Personnel	Posting Special Education Positions	Tami Collins:#38	100.00%
2/6/2015	Marketing / Enrollment	Success Academy Logo and Motto "preparing students for life"	Susan Walterhouse:#39;#Chad Addie:#34;#Dorian Dickinson (Marketing);#45	100.00%
2/8/2015	Personnel	OG Teacher Recruiting Meeting	Paul Schlottman:#29;#Rachell Davis:#40;#Lea Ann Solberg:#41;#Emily Mares:#42	100.00%
2/10/2015	Authorizer / Charter	Elementary School Innovation Proposal	Paul Schlottman:#29	100.00%
2/11/2015	Marketing	Logos to Emily of Success, CASB, Microsoft	Dorian Dickinson (Marketing);#45;#Susan Walterhouse:#39	100.00%
2/11/2015	Marketing / Enrollment	Press Release for Success Academy	Susan Walterhouse:#39;#Dorian Dickinson (Marketing);#45	100.00%
2/11/2015	Marketing / Enrollment	Set Up Facebook Page for Success Academy	Chad Addie:#34;#Susan Walterhouse:#39;#Dorian Dickinson (Marketing);#45	100.00%
2/13/2015	Marketing / Enrollment	Kick Off Student Marketing Campaign	Susan Walterhouse:#39;#Dorian Dickinson (Marketing);#45	100.00%
2/16/2015	Personnel	Screening Interviews for Success Academy Principal	Paul Schlottman:#29;#Tami Collins:#38	100.00%
2/17/2015	Authorizer / Charter	Closing with New Authorizer Trine University	Paul Schlottman:#29;#Charles Loeser (Board Attorney);#46	100.00%
2/18/2015	Policy / Legal	Closing on the building	Success Academy Members:#33	100.00%
2/20/2015	Policy	Revisit Budget to Adapt to One Large School Rather than three	Paul Schlottman:#29;#Kim Richardson:#43	100.00%

		Small		
2/20/2015	Marketing / Enrollment Give aways, name tags, jackets, bags, booth setup, Success popup, Career Academy popup, table cloths, rental van, hotels, etc.	Teacher Fair Swag	Emily Mares:#42	100.00%
2/23/2015	Personnel	2nd Round Committee Interviews for Principal	Paul Schlottman:#29;#Tami Collins:#38	100.00%
2/25/2015	Personnel	Replacement for Evan	Tami Collins:#38;#Paul Schlottman:#29;#Evan Henry:#50	100.00%
2/28/2015	Marketing / Enrollment	Open House for New Students	Susan Walterhouse:#39;#Chad Addie:#34	100.00%
3/2/2015	Personnel	Complete Hiring of Principal	Paul Schlottman:#29;#Tami Collins:#38	100.00%
3/2/2015	Marketing	Completed Marketing Booth for Fairs	Dorian Dickinson (Marketing);#45;#Emily Mares:#42	100.00%
3/3/2015	Personnel	DePaul / Loyola / Chicago Illinois University Teacher Fair	Paul Schlottman:#29;#Chad Addie:#34;#Rachell Davis:#40;#Dorian Dickinson (Marketing);#45;#Emily Mares:#42	100.00%
3/6/2015	Marketing / Enrollment	Heores Academy Ground Breaking Event-On Site	Success Academy Members:#33	100.00%
3/6/2015	All	Success Academy Ground Breaking Event-On Site	All Users (membership);#47	100.00%
3/6/2015	Marketing	Success Academy Ground Breaking Event-At CASB	Emily Mares:#42	100.00%
3/16/2015	Marketing / Enrollment Please let Tami know	Opening of accepting INTERNAL applications for Success and Career Academy	All Users (membership);#47	100.00%
3/18/2015	Operations	Budget Revisions	Kim Richardson:#43;#Paul Schlottman (Executive Director);#48	100.00%
3/18/2015	Marketing / Enrollment	Teacher Recruiting Marketing Materials	Susan Walterhouse:#39;#Dorian Dickinson (Marketing);#45;#Tami	100.00%

	Media Items, Brochures, Flyers, Salary/Benefits Summary, Mission Vision, New School Promotion Material - site plans, drawings, elevations, etc., Video for booth, Video for TV add, Complete staff bios and photos, etc.		Collins,#38	
3/18/2015	Marketing / Enrollment	Begin Accepting External Student Applications	Susan Walterhouse,#39,#Dorian Dickinson (Marketing),#45	100.00%
3/18/2015	Authorizer / Charter	Charlie to set up registration by student cap number	Paul Schlotzman,#29,#Charles Loeser (Board Attorney),#46	0.00%
3/18/2015	Marketing / Enrollment	Market to Campuses for Teacher Recruiting	Susan Walterhouse,#39,#Dorian Dickinson (Marketing),#45	0.00%
3/18/2015	Marketing / Enrollment	Press Release Open Enrollment	Susan Walterhouse,#39,#Dorian Dickinson (Marketing),#45	0.00%
3/18/2015	Technology	Complete Cisco Phone Audit	Roger Johnson,#30	50.00%
3/18/2015	Fundraising	IRF Loan	Lawrence Garatoni (Board President),#44	0.00%
3/18/2015	Marketing Meeting 2/10/15 Items completed are strike through Everything is as soon as possible To do:Apprentice Academy logo with gears for all adult training and veterans in all formats – deadline FridayPress releases – deadline ASAPTable cloths (Success, CASB and	Marketing Tasks Stemming from 2/10/15 Meeting	Emily Mares,#42,#Susan Walterhouse,#39,#Dorian Dickinson (Marketing),#45,#Sarah Fine,#36,#Paul Schlotzman (Executive Director),#48	70.00%

	<p>Apprentice) -  EmilyBack drop for booth (Success, CASB and Apprentice) -  EmilyNew webpage up ASAP -  DorianWebsites (Success and CASB on one website and Apprentice separate website) – Dorian / RogerHuman Resources or Careers  Tab on websiteStudent Application information tabs on all  webpagesFacebook for all three (3) separate: Apprentice –Sara, Success-Susan, CASB-ChadStaff bios finished ASAP – Nikki and DorianStudent videos – Dorian next ThursdayTeacher recruiting materials  Media Items, Brochures, Flyers, Salary/Benefits Summary, Mission Vision, New School Promotion Material - site plans, drawings, elevations, etc., Video for booth, Video for TV add,</p>			
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	Complete staff bios and photos, etc.				
3/18/2015	Operations	Complete Org Chart for Both Schools	Paul Schlotzman;#29;#Success Academy Members;#33;#Emily Mares;#42	100.00%	
3/18/2015	Authorizer / Legal	Medicaid Number	Charles Loeser (Board Attorney);#46	0.00%	
3/18/2015	Operations	Determine fees for All Day K and After School services	Success Academy Members;#33	0.00%	
3/18/2015	Marketing / Enrollment	Establish on site enrollment	Susan Waterhouse;#39;#Chad Addie;#34;#Dorian Dickinson (Marketing);#45	0.00%	
3/18/2015	Marketing	Billboards Throughout Area	Dorian Dickinson (Marketing);#45;#Susan Waterhouse;#39;#Chad Addie;#34	0.00%	
3/18/2015	Marketing	Sign for Success school on building site	Emily Mares;#42	100.00%	
3/18/2015	Authorizer/Legal	Obtain Medicaid Number for Success Academy	Charles Loeser (Board Attorney);#46	0.00%	
3/18/2015	Marketing	Lease Welcome and Enrollment Center	Lawrence Garatoni (Board President);#44	0.00%	
3/18/2015	Marketing	Develop Welcome and Enrollment Center	Chad Addie;#34;#Evan Henry;#50	0.00%	
3/18/2015	Policy/Legal	Resolution of Legal Easement	Charles Loeser (Board Attorney);#46;#Lawrence Garatoni (Board President);#44	0.00%	
3/18/2015	Operations	Parking Lot Layout	Paul Schlotzman;#29;#Roger Johnson;#30	0.00%	
3/18/2015	Marketing	Begin contacts with community organizations	Chad Addie;#34;#Susan Waterhouse;#39;#Dorian Dickinson (Marketing);#45	0.00%	
3/23/2015	Authorizer/Legal	Coordinate Trine Timing and Task with Lindsey	Charles Loeser (Board Attorney);#46	0.00%	
3/23/2015	Equipment	Contact Holly	Susan Waterhouse;#39	100.00%	
3/23/2015	Marketing	Develop and Share Marketing Plan in Tasks	Chad Addie;#34;#Susan Waterhouse;#39;#Dorian Dickinson (Marketing);#45	0.00%	
3/23/2015	Personnel	SRO Discussion	Paul Schlotzman;#29;#Tami	0.00%	

				Collins:#38	
3/23/2015	Technology	Electrical Device J-Box Layouts		Roger Johnson:#30	0.00%
3/24/2015	Marketing	Marketing Dean Fecher		Dorian Dickinson (Marketing):#45;#Chad Addie:#34;#Susan Walterhouse:#39	0.00%
3/28/2015	Marketing	Open House		Susan Walterhouse:#39;#Chad Addie:#34;#Dorian Dickinson (Marketing):#45	100.00%
4/1/2015	Policy	Investigate SBSCS providing Busing		Lawrence Garatoni (Board President):#44	0.00%
4/1/2015	Personnel	New Teacher Get Togethers		Tami Collins:#38;#Paul Schlottman:#29;#Dorian Dickinson (Marketing):#45	0.00%
4/13/2015	Personnel	Ventures Training for Interviewers		Tami Collins:#38;#Chad Addie:#34;#Rachell Davis:#40;#Lydia Jagger:#35	100.00%
4/13/2015	Personnel	Hire additional Marketing Temps		Chad Addie:#34;#Tami Collins:#38	0.00%
4/14/2015	Personnel	Michigan State Teacher Fair		Paul Schlottman:#29;#Chad Addie:#34;#Rachell Davis:#40;#Dorian Dickinson (Marketing):#45;#Emily Mares:#42	100.00%
4/15/2015	Personnel	Hire Director of Student Services (Assistant Principal)		Paul Schlottman:#29;#Tami Collins:#38	50.00%
4/16/2015	Personnel	Miami of Ohio Teacher Fair		Paul Schlottman:#29;#Chad Addie:#34;#Rachell Davis:#40;#Dorian Dickinson (Marketing):#45;#Emily Mares:#42	50.00%
4/25/2015	Marketing	Open House		Chad Addie:#34;#Susan Walterhouse:#39;#Dorian Dickinson (Marketing):#45	0.00%
4/29/2015	Personnel	Ball State Teacher Fair		Paul Schlottman:#29;#Chad Addie:#34;#Rachell Davis:#40;#Dorian Dickinson (Marketing):#45;#Emily Mares:#42	50.00%
5/1/2015	Fundraising	Complete "Success Academy Project Cost and Financing Plan"		Lawrence Garatoni (Board President):#44	0.00%
5/1/2015	Fundraising	Complete the \$1 M Revolving Loan		Lawrence Garatoni (Board	0.00%



		Fund Financing	President);#44	
5/1/2015	Fundraising	Meet with Beck Drury and Margo Dumont Regarding Fundraising Ideas	Lawrence Garatoni (Board President);#44	0.00%
5/1/2015	Fundraising	Meet w/ Major St. Joseph County Foundations to Seek Funds	Lawrence Garatoni (Board President);#44	0.00%
5/1/2015	Fundraising	Investigate Possible TIF Funding	Lawrence Garatoni (Board President);#44	0.00%
5/1/2015	Fundraising	Investigate Status of Proposed Legislation to Provide Capital Funding to Charter Schools	Lawrence Garatoni (Board President);#44	0.00%
5/1/2015	Technology	Monitor Bidding Process	Roger Johnson;#30	0.00%
5/1/2015	Technology	Receive Bids	Roger Johnson;#30	0.00%
5/1/2015	Technology	Get Bids for Dell through Cumulus	Roger Johnson;#30	0.00%
5/29/2015	Technology	Order Cisco Phone Slave Server & Phones	Roger Johnson;#30	0.00%
6/1/2015	Personnel	Complete All Teacher Interviews and Hiring	Paul Schlotzman;#29;#Tami Collins;#38;#Emily Mares;#42	60.00%
6/1/2015	Operations	Put Up for Bid Cafeteria Services	Paul Schlotzman;#29;#Emily Mares;#42	0.00%
6/1/2015	Operations	Finalize Hours of Operation School Start and End Times	Success Academy Members;#33	0.00%
6/5/2015	Technology	Order Scale Storage System	Roger Johnson;#30	0.00%
6/5/2015	Technology	Completed Plan for CASB Network Rebuild	Roger Johnson;#30	20.00%
6/19/2015	Technology	Order Phone & Internet Services	Roger Johnson;#30	10.00%
6/19/2015	Technology	Rebuild CASB Network	Roger Johnson;#30	50.00%
6/26/2015	Technology	Complete Cisco Configuration For Success Addition	Roger Johnson;#30	0.00%
7/1/2015	Personnel	New Teacher Start Date July 1st	Paul Schlotzman;#29	0.00%
7/1/2015	Marketing	Maintain Engagement with Prospective Teachers	Tami Collins;#38;#Dorian Dickinson (Marketing);#45	0.00%
7/1/2015	Marketing	Maintain Engage with New Hires	Tami Collins;#38;#Dorian Dickinson (Marketing);#45	0.00%
7/1/2015	Operations	Bid out house keeping services	Evan Henry;#50	0.00%
7/1/2015	Operations	Develop Success Academy Student	Paul Schlotzman;#29;#Tami	0.00%

		Handbook	Collins:#38	
7/1/2015	Operations	Dean Stuff	Paul Schlottman,#29;#Tami Collins:#38	0.00%
7/8/2015	Technology	Order Desktops for Labs, Teachers, and Staff	Roger Johnson:#30	80.00%
8/1/2015	Project	Success Academy Opens	Paul Schlottman:#29	0.00%
8/1/2015	Technology	Install & Configure IT Equipment	Roger Johnson:#30	0.00%
8/3/2015	Personnel	Teacher Training	Tami Collins:#38;#Paul Schlottman:#29	0.00%
8/3/2015	Equipment - Describe all movable equipment	Equipment Team to Develop Proposed Equipment List	Chad Roggow:#52;#Yvonne Kinney:#53;#Susan Walterhouse:#39;#Emily Mares:#42;#Tami Collins:#38	0.00%
	Sue Panzica, Chad Roggow, Yvonne Kinney, Susan Walterhouse			
8/4/2015	Technology	Order Audio System for Auditorium	Roger Johnson:#30	15.00%
8/10/2015	Technology	Teacher Training	Roger Johnson:#30	0.00%
8/10/2015	Personnel	Teacher Set Up Rooms and Building	Success Academy Members:#33	0.00%
8/10/2015	Operations	Clean New Building	Success Academy Members:#33	0.00%
8/17/2015	All	School Starts August 17th	Paul Schlottman:#29;#Administrator Local Admins:#51	0.00%

X: SASB Task List April 2015.doc

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 18: Insurance Coverage

# ■ OLD NATIONAL INSURANCE

May 1st, 2015

Charles Loeser  
Career Academy of South Bend, Inc  
4100 Edison Lakes Parkway, Suite 260  
Mishawaka, IN 46545

RE: Career Academy of South Bend, Inc., dba Success Academy

Dear Charles,

Below are your insurance estimates for the upcoming annual policy term for Success Academy.

- Building & Personal Property \$13,000
- Liability including Professional Liability \$2,000 - This coverage includes Education One, LLC., Trine University, and the Indiana Department of Education as Additional Insureds on a Primary basis
- Automobile \$1,500
- Workers Compensation \$6,000
- Misc \$1,500 - This includes coverage under the Crime, Computer, Student Accident and Umbrella policies

Please let me know if you have additional questions on the above.

Regards,



Thomas J. McGovern, CIC  
Old National Insurance

School Name: Career Academy South Bend, Inc

## SCHOOL ENROLLMENT PROJECTIONS

Planned Number of Students																	
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL	% ELL	% SPED	% FRL
Year 1: 2015-2016	60	60	75	75	75	100	100	100	100	100	100	100	100	1145			
Year 2: 2016-2017	100	100	100	100	100	100	100	100	100	100	100	100	100	1300			
Year 3: 2017-2018	100	100	100	100	100	100	100	100	100	100	100	100	100	1300			
Year 4: 2018-2019	100	100	100	100	100	100	100	100	100	100	100	100	100	1300			
Year 5: 2019-2020	100	100	100	100	100	100	100	100	100	100	100	100	100	1300			

Planned Number of Classes														
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
Year 1: 2015-2016														0
Year 2: 2016-2017														0
Year 3: 2017-2018														0
Year 4: 2018-2019														0
Year 5: 2019-2020														0

**Per Paul, Each student will take 8 classes.  
Even at the lower levels they will have Math, Reading and/or Writing, Science, Social Studies,  
PE/Health, Art, a Foreign Language and Music.**

Career Academy South Bend Inc - All Schools						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>REVENUE</b>						
<b>State Revenue</b>						
Basic Grant	\$ 3,599,904	\$ 8,034,112	\$ 9,278,195	\$ 9,278,195	\$ 9,278,195	\$ 9,278,195
State Matching Funds for School Lunch Program						
Professional Development						
Technology Grants						
Remediation Program						
Full-Day Kindergarten		\$ -	\$ -	\$ -	\$ -	\$ -
Gifted and Talented Program						
Textbook Reimbursement	\$ 23,408	\$ 53,777	\$ 60,000	\$ 63,000	\$ 66,000	\$ 69,000
Summer School		\$ 30,000	\$ 32,000	\$ 34,000	\$ 36,000	\$ 38,000
Other State Revenue (please describe)						
Other State Revenue (please describe)						
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant		\$ 172,500	\$ -			
Facilities Assistance Program Grant						
Public Law 101-476 (IDEA)						
Title I	\$ 116,008	\$ 252,304	\$ 286,000	\$ 286,000	\$ 286,000	\$ 286,000
Title II						
Federal Lunch Program						
Federal Breakfast Reimbursement						
Other Revenue Federal sources - Spec Ed Part B	\$ 48,532	\$ 80,000	\$ 83,000	\$ 86,000	\$ 89,000	\$ 92,000
Other Revenue Federal sources (please describe)						
<b>Other Revenues</b>						
Committed Philanthropic Donations	\$ 1,022,024	\$ -	\$ -	\$ -	\$ -	\$ -
Before and After Care Fees						
Interest Income						
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 52,866	\$ 75,486	\$ 80,560	\$ 81,000	\$ 81,000	\$ 81,000
Other - Rental Income - Riverside Church	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300
Other - Rental Income - Middle School		\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000
Other - Rental Income - Elementary		\$ 60,000	\$ 550,000	\$ 550,000	\$ 550,000	\$ 550,000
Other - TIF Grant	\$ 253,750					
<b>Total Revenue</b>	\$ 5,130,792	\$ 9,572,479	\$ 11,434,055	\$ 10,792,495	\$ 10,800,495	\$ 10,808,495
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Wages, Benefits and Payroll Taxes	\$ 3,797,042	\$ 5,963,130	\$ 6,423,269	\$ 6,423,269	\$ 6,423,269	\$ 6,423,269
Substitute Teachers	\$ 77,679	\$ 30,000	\$ 33,000	\$ 36,000	\$ 39,000	\$ 42,000
Professional Development	\$ 15,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000
Bonuses		\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000

Other - Athletic officials/referees	\$ 5,740	\$ 5,854	\$ 5,971	\$ 6,090	\$ 6,212	\$ 6,336
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Personnel Expenses</b>	\$ 3,895,461	\$ 6,448,984	\$ 6,912,240	\$ 6,915,359	\$ 6,918,481	\$ 6,921,605
<b>Instructional Supplies and Resources</b>						
Textbooks	\$ 50,109	\$ 78,777	\$ 60,000	\$ 63,000	\$ 66,000	\$ 69,000
Library, periodicals, etc						
Technology						
Assessment materials	\$ 6,985	\$ 9,124	\$ 9,306	\$ 9,493	\$ 9,683	\$ 9,877
Computers						
Software						
Other classroom supplies	\$ 172,427	\$ 215,876	\$ 220,193	\$ 225,933	\$ 229,014	\$ 232,814
Field trips, other unclassified items	\$ 5,217	\$ 9,321	\$ 9,427	\$ 10,096	\$ 10,298	\$ 10,504
Co-curricular & Athletics	\$ 16,795	\$ 17,131	\$ 17,473	\$ 17,822	\$ 18,206	\$ 18,570
Other -Obesity Grant purchases	\$ 9,707					
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Instructional Supplies and Resources</b>	\$ 261,241	\$ 330,229	\$ 316,399	\$ 326,344	\$ 333,201	\$ 340,765
<b>Support Supplies and Resources</b>						
Administrative Computers						
Administrative Software	\$ 1,282	\$ 3,000				
Administration Dues, fees, misc expenses	\$ 70,491	\$ 71,901	\$ 73,338	\$ 74,805	\$ 76,302	\$ 77,829
Office supplies	\$ 54,025	\$ 55,107	\$ 56,208	\$ 56,959	\$ 58,098	\$ 59,260
Other -Nurse supplies	\$ 4,615	\$ 6,908	\$ 7,047	\$ 7,188	\$ 7,332	\$ 7,479
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Support Supplies and Resources</b>	\$ 130,414	\$ 136,916	\$ 136,593	\$ 138,952	\$ 141,732	\$ 144,568
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreats						
Charter Board Supplies & Equipment						
Charter Board Dues, fees, etc	\$ 264	\$ 399	\$ 408	\$ 417	\$ 426	\$ 435
Other (please describe)						
Other (please describe)						

Other (please describe)							
Other (please describe)							
Other (please describe)							
<b>Total Board Expenses</b>	\$ 264	\$ 399	\$ 408	\$ 417	\$ 426	\$ 435	
<b>Professional Purchased or Contracted Services</b>							
Legal Services							
Audit Services (compliant with SBOA requirements)		\$ 9,000	\$ 9,000	\$ 9,999	\$ 9,999	\$ 9,999	
Payroll Services	\$ 4,279	\$ 6,564	\$ 6,695	\$ 6,829	\$ 6,966	\$ 7,106	
Accounting Services	\$ 1,500	\$ 2,001	\$ 2,001	\$ 2,499	\$ 2,499	\$ 2,499	
Printing/Newsletter/Annual Report Services							
Consultants	\$ 10,556	\$ 10,767	\$ 10,983	\$ 11,203	\$ 11,427	\$ 11,655	
Internet Services	\$ 23,841	\$ 15,700	\$ 16,014	\$ 16,334	\$ 16,661	\$ 16,995	
Telephone/Telecommunication Services	\$ 28,750	\$ 43,326	\$ 44,193	\$ 45,077	\$ 45,978	\$ 46,897	
Total Insurance Costs	\$ 25,965	\$ 41,484	\$ 42,313	\$ 43,159	\$ 44,023	\$ 44,903	
Travel	\$ 34,302	\$ 21,591	\$ 22,023	\$ 22,464	\$ 22,913	\$ 23,371	
Postage	\$ 3,539	\$ 4,110	\$ 4,192	\$ 4,276	\$ 4,361	\$ 4,449	
Special Education Services	\$ 46,008	\$ 64,928	\$ 67,867	\$ 76,000	\$ 76,500	\$ 77,010	
Student Services	\$ 29,970	\$ 30,568	\$ 33,179	\$ 34,803	\$ 34,968	\$ 35,157	
Food service	\$ 9,811						
Transportation	\$ 17,925	\$ 9,142	\$ 9,324	\$ 9,510	\$ 9,700	\$ 9,894	
Nursing Services							
Other - Athletic fees/dues	\$ 12,098	\$ 12,340	\$ 12,587	\$ 12,838	\$ 13,095	\$ 13,357	
Other - Advertising	\$ 82,575	\$ 80,001	\$ 80,001	\$ 45,000	\$ 45,000	\$ 45,000	
Other - Meals provided	\$ 13,212	\$ 14,476	\$ 15,745	\$ 16,520	\$ 16,801	\$ 17,087	
Other - Rentals	\$ 18,795	\$ 20,171	\$ 21,554	\$ 22,445	\$ 22,844	\$ 23,251	
<b>Total Professional Purchased or Contracted Services</b>	\$ 363,126	\$ 386,169	\$ 397,671	\$ 378,956	\$ 383,735	\$ 388,630	
<b>Facilities</b>							
Rent, mortgage, or other facility cost	\$ 40,215	\$ 499,000	\$ 988,000	\$ 1,007,000	\$ 1,006,000	\$ 1,005,000	
Furniture & Equipment							
Gas/electric	\$ 98,569	\$ 170,540	\$ 173,951	\$ 177,430	\$ 180,979	\$ 184,599	
Water/Sewer	\$ 7,819	\$ 13,976	\$ 14,255	\$ 14,540	\$ 14,831	\$ 15,127	
Grounds Keeping	\$ 21,637	\$ 33,069	\$ 33,731	\$ 34,405	\$ 35,094	\$ 35,795	
Maintenance Services	\$ 59,257	\$ 80,442	\$ 82,251	\$ 83,896	\$ 85,573	\$ 87,285	
Custodial	\$ 157,714	\$ 310,868	\$ 315,085	\$ 319,366	\$ 323,714	\$ 328,127	
Waste disposal	\$ 4,055	\$ 8,137	\$ 8,300	\$ 8,467	\$ 8,636	\$ 8,766	
Debt Service - GFF/Garatoni	\$ 87,150	\$ 88,893	\$ 90,671	\$ 92,484	\$ 92,484	\$ 92,484	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)							
Other (please describe)							
Other (please describe)							
<b>Total Facilities</b>	\$ 476,416	\$ 1,204,925	\$ 1,706,244	\$ 1,737,588	\$ 1,747,311	\$ 1,757,183	



<b>Other</b>							
Contingency							
Charter Administrative Fee	\$ 71,970	\$ 241,023	\$ 278,346	\$ 278,346	\$ 278,346	\$ 278,346	\$ 278,346
CMO/EMO Fee							
Common School Fund Loan Interest Costs							
Other (please describe)							
Other (please describe)							
Other (please describe)							
<b>Total Other</b>	\$ 71,970	\$ 241,023	\$ 278,346	\$ 278,346	\$ 278,346	\$ 278,346	\$ 278,346
<b>Total Expenditures</b>	\$ 5,198,891	\$ 8,748,645	\$ 9,747,901	\$ 9,775,962	\$ 9,803,232	\$ 9,803,232	\$ 9,831,532
<b>Carryover/Deficit</b>	\$ (68,099)	\$ 823,834	\$ 1,686,154	\$ 1,016,533	\$ 997,263	\$ 997,263	\$ 976,963
<b>Cumulative Carryover/(Deficit)</b>	\$ (68,099)	\$ 755,736	\$ 2,441,890	\$ 3,458,424	\$ 4,455,687	\$ 4,455,687	\$ 5,432,650

Career Academy South Bend Inc - High School						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>REVENUE</b>						
<b>State Revenue</b>						
Basic Grant	\$ 1,900,749	\$ 2,875,737	\$ 2,929,847	\$ 2,929,847	\$ 2,929,847	\$ 2,929,847
State Matching Funds for School Lunch Program						
Professional Development						
Technology Grants						
Remediation Program						
Full-Day Kindergarten						
Gifted and Talented Program						
Textbook Reimbursement	\$ 12,086	\$ 17,887	\$ 19,000	\$ 20,000	\$ 21,000	\$ 22,000
Summer School		\$ 15,000	\$ 16,000	\$ 17,000	\$ 18,000	\$ 19,000
Other State Revenue (please describe)						
Other State Revenue (please describe)						
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant		\$ -	\$ -			
Facilities Assistance Program Grant						
Public Law 101-476 (IDEA)						
Title I	\$ 59,895	\$ 88,645	\$ 89,000	\$ 89,000	\$ 89,000	\$ 89,000
Title II						
Federal Lunch Program						
Federal Breakfast Reimbursement						
Other Revenue Federal sources - Spec Ed Part B	\$ 25,057	\$ 28,000	\$ 29,000	\$ 30,000	\$ 31,000	\$ 32,000
Other Revenue Federal sources (please describe)						
<b>Other Revenues</b>						
Committed Philanthropic Donations	\$ 766,518	\$ -	\$ -	\$ -	\$ -	\$ -
Before and After Care Fees						
Interest Income						
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 27,295	\$ 31,989	\$ 32,000	\$ 32,000	\$ 32,000	\$ 32,000
Other - Rental Income - Riverside Church	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300	\$ 14,300
Other - TIF Grant	\$ 253,750					
Other - Rental Income - Middle School		\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000
<b>Total Revenue</b>	\$ 3,059,649	\$ 3,671,558	\$ 3,729,147	\$ 3,532,147	\$ 3,535,147	\$ 3,538,147
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Wages, Benefits and Payroll Taxes	\$ 2,039,585	\$ 2,079,365	\$ 2,131,515	\$ 2,131,515	\$ 2,131,515	\$ 2,131,515
Substitute Teachers	\$ 40,494	\$ 10,000	\$ 11,000	\$ 12,000	\$ 13,000	\$ 14,000
Professional Development	\$ 7,500	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000

Bonuses		\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000
Other - Athletic officials/referees	\$ 3,520	\$ 3,590	\$ 3,662	\$ 3,735	\$ 3,810	\$ 3,886
Other (please describe)						\$ -
Other (please describe)						\$ -
Other (please describe)						\$ -
<b>Total Personnel Expenses</b>	\$ 2,091,098	\$ 2,242,955	\$ 2,296,177	\$ 2,297,250	\$ 2,298,325	\$ 2,299,401
<b>Instructional Supplies and Resources</b>						
Textbooks	\$ 15,066	\$ 17,887	\$ 19,000	\$ 20,000	\$ 21,000	\$ 22,000
Library, periodicals, etc						
Technology						
Assessment materials	\$ 3,493	\$ 3,562	\$ 3,633	\$ 3,706	\$ 3,780	\$ 3,856
Computers						
Software						
Other classroom supplies	\$ 128,483	\$ 131,053	\$ 133,674	\$ 137,684	\$ 139,000	\$ 141,000
Field trips, other unclassified items	\$ 2,694	\$ 2,747	\$ 2,802	\$ 2,858	\$ 2,915	\$ 2,973
Co-curricular & Athletics	\$ 11,970	\$ 12,210	\$ 12,454	\$ 12,703	\$ 12,985	\$ 13,245
Other -Obesity Grant purchases	\$ 9,707					
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Instructional Supplies and Resources</b>	\$ 171,414	\$ 167,459	\$ 171,563	\$ 176,951	\$ 179,680	\$ 183,074
<b>Support Supplies and Resources</b>						
Administrative Computers						
Administrative Software	\$ 662	\$ 1,000				
Administration Dues, fees, misc expenses	\$ 36,395	\$ 23,967	\$ 24,446	\$ 24,935	\$ 25,434	\$ 25,943
Office supplies	\$ 27,893	\$ 18,369	\$ 18,736	\$ 18,737	\$ 19,112	\$ 19,494
Other -Nurse supplies	\$ 2,383	\$ 2,431	\$ 2,480	\$ 2,530	\$ 2,581	\$ 2,633
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Support Supplies and Resources</b>	\$ 67,333	\$ 45,767	\$ 45,662	\$ 46,202	\$ 47,127	\$ 48,070
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreats						
Charter Board Supplies & Equipment						
Charter Board Dues, fees, etc	\$ 136	\$ 139	\$ 142	\$ 145	\$ 148	\$ 151
Other (please describe)						

Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Board Expenses</b>	\$ 136	\$ 139	\$ 142	\$ 145	\$ 148	\$ 151
<b>Professional Purchased or Contracted Services</b>						
Legal Services						
Audit Services (compliant with SBOA requirements)		\$ 3,000	\$ 3,000	\$ 3,333	\$ 3,333	\$ 3,333
Payroll Services	\$ 2,209	\$ 2,253	\$ 2,298	\$ 2,344	\$ 2,391	\$ 2,439
Accounting Services	\$ 750	\$ 667	\$ 667	\$ 833	\$ 833	\$ 833
Printing/Newsletter/Annual Report Services						
Consultants	\$ 7,728	\$ 7,882	\$ 8,040	\$ 8,201	\$ 8,365	\$ 8,532
Internet Services	\$ 12,309	\$ 5,800	\$ 5,916	\$ 6,034	\$ 6,155	\$ 6,278
Telephone/Telecommunication Services	\$ 14,844	\$ 15,141	\$ 15,444	\$ 15,753	\$ 16,068	\$ 16,389
Total Insurance Costs	\$ 13,406	\$ 13,674	\$ 13,947	\$ 14,226	\$ 14,511	\$ 14,801
Travel	\$ 30,189	\$ 15,396	\$ 15,704	\$ 16,018	\$ 16,338	\$ 16,665
Postage	\$ 1,827	\$ 1,864	\$ 1,901	\$ 1,939	\$ 1,978	\$ 2,018
Special Education Services	\$ 23,754	\$ 24,229	\$ 24,714	\$ 26,000	\$ 26,000	\$ 26,000
Student Services	\$ 21,222	\$ 21,646	\$ 22,079	\$ 22,521	\$ 22,500	\$ 22,500
Food service	\$ 5,066					
Transportation	\$ 9,645	\$ 4,919	\$ 5,017	\$ 5,117	\$ 5,219	\$ 5,323
Nursing Services						
Other - Athletic fees/dues	\$ 6,171	\$ 6,295	\$ 6,421	\$ 6,549	\$ 6,680	\$ 6,814
Other - Advertising	\$ 42,808	\$ 26,667	\$ 26,667	\$ 15,000	\$ 15,000	\$ 15,000
Other - Meals provided	\$ 6,821	\$ 6,958	\$ 7,097	\$ 7,239	\$ 7,384	\$ 7,532
Other - Rentals	\$ 9,704	\$ 9,898	\$ 10,096	\$ 10,298	\$ 10,504	\$ 10,714
<b>Total Professional Purchased or Contracted Services</b>	\$ 208,453	\$ 166,289	\$ 169,008	\$ 161,405	\$ 163,259	\$ 165,171
<b>Facilities</b>						
Rent, mortgage, or other facility cost	\$ 40,215	\$ 39,000	\$ 38,000	\$ 37,000	\$ 36,000	\$ 35,000
Furniture & Equipment						
Gas/electric	\$ 50,891	\$ 51,909	\$ 52,947	\$ 54,006	\$ 55,086	\$ 56,188
Water/Sewer	\$ 4,037	\$ 4,118	\$ 4,200	\$ 4,284	\$ 4,370	\$ 4,457
Grounds Keeping	\$ 11,171	\$ 11,394	\$ 11,622	\$ 11,854	\$ 12,092	\$ 12,333
Maintenance Services	\$ 30,594	\$ 31,206	\$ 31,830	\$ 32,467	\$ 33,116	\$ 33,778
Custodial	\$ 81,428	\$ 83,056	\$ 84,717	\$ 86,411	\$ 88,140	\$ 89,902
Waste disposal	\$ 2,094	\$ 2,136	\$ 2,179	\$ 2,223	\$ 2,267	\$ 2,312
Debt Service - GFF/Garatoni	\$ 64,737	\$ 66,032	\$ 67,353	\$ 68,700	\$ 68,700	\$ 68,700
Other Depreciation Expense						
Other (please describe)						
Other (please describe)						
Other (please describe)						

<b>Total Facilities</b>	\$ 285,167	\$ 288,851	\$ 292,848	\$ 296,945	\$ 299,771	\$ 302,670
<b>Other</b>						
Contingency						
Charter Administrative Fee	\$ 34,104	\$ 86,272	\$ 87,895	\$ 87,895	\$ 87,895	\$ 87,895
CMO/EMO Fee						
Common School Fund Loan Interest Costs						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Other</b>	\$ 34,104	\$ 86,272	\$ 87,895	\$ 87,895	\$ 87,895	\$ 87,895
<b>Total Expenditures</b>	\$ 2,857,706	\$ 2,997,732	\$ 3,063,295	\$ 3,066,793	\$ 3,076,205	\$ 3,086,432
<b>Carryover/Deficit</b>	\$ 201,943	\$ 673,826	\$ 665,852	\$ 465,354	\$ 458,942	\$ 451,715
<b>Cumulative Carryover/(Deficit)</b>	\$ 201,943	\$ 875,769	\$ 1,541,621	\$ 2,006,975	\$ 2,465,917	\$ 2,917,632

Career Academy South Bend Inc - Middle School						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>REVENUE</b>						
<b>State Revenue</b>						
Basic Grant	\$ 1,699,155	\$ 2,796,764	\$ 2,858,424	\$ 2,858,424	\$ 2,858,424	\$ 2,858,424
State Matching Funds for School Lunch Program						
Professional Development						
Technology Grants						
Remediation Program						
Full-Day Kindergarten						
Gifted and Talented Program						
Textbook Reimbursement	\$ 11,322	\$ 17,890	\$ 19,000	\$ 20,000	\$ 21,000	\$ 22,000
Summer School		\$ 15,000	\$ 16,000	\$ 17,000	\$ 18,000	\$ 19,000
Other State Revenue (please describe)						
Other State Revenue (please describe)						
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant		\$ -	\$ -			
Facilities Assistance Program Grant						
Public Law 101-476 (IDEA)						
Title I	\$ 56,113	\$ 88,659	\$ 89,000	\$ 89,000	\$ 89,000	\$ 89,000
Title II						
Federal Lunch Program						
Federal Breakfast Reimbursement						
Other Revenue Federal sources - Spec Ed Part B	\$ 23,475	\$ 26,000	\$ 27,000	\$ 28,000	\$ 29,000	\$ 30,000
Other Revenue Federal sources (please describe)						
<b>Other Revenues</b>						
Committed Philanthropic Donations	\$ 255,506					
Before and After Care Fees						
Interest Income						
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 25,571	\$ 31,997	\$ 32,000	\$ 32,000	\$ 32,000	\$ 32,000
Other - Rental Income - Riverside Church						
Other - TIF Grant						
Other - Rental Income - Elementary		\$ 60,000	\$ 550,000	\$ 550,000	\$ 550,000	\$ 550,000
<b>Total Revenue</b>	\$ 2,071,143	\$ 3,236,310	\$ 3,791,424	\$ 3,594,424	\$ 3,597,424	\$ 3,600,424
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Wages, Benefits and Payroll Taxes	\$ 1,757,457	\$ 2,010,367	\$ 2,060,126	\$ 2,060,126	\$ 2,060,126	\$ 2,060,126
Substitute Teachers	\$ 37,185	\$ 10,000	\$ 11,000	\$ 12,000	\$ 13,000	\$ 14,000
Professional Development	\$ 7,500	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000

Bonuses		\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000
Other - Athletic officials/referees	\$ 2,220	\$ 2,264	\$ 2,309	\$ 2,355	\$ 2,402	\$ 2,450
Other (please describe)					\$ -	
Other (please describe)					\$ -	
Other (please describe)					\$ -	
<b>Total Personnel Expenses</b>	\$ 1,804,362	\$ 2,172,631	\$ 2,223,435	\$ 2,224,481	\$ 2,225,528	\$ 2,226,576
<b>Instructional Supplies and Resources</b>						
Textbooks	\$ 35,043	\$ 17,890	\$ 19,000	\$ 20,000	\$ 21,000	\$ 22,000
Library, periodicals, etc						
Technology	\$ -					
Assessment materials	\$ 3,493	\$ 3,562	\$ 3,633	\$ 3,706	\$ 3,780	\$ 3,856
Computers						
Software						
Other classroom supplies	\$ 43,944	\$ 44,823	\$ 45,719	\$ 46,633	\$ 47,566	\$ 48,517
Field trips, other unclassified items	\$ 2,523	\$ 2,574	\$ 2,625	\$ 2,678	\$ 2,732	\$ 2,787
Co-curricular & Athletics	\$ 4,825	\$ 4,921	\$ 5,019	\$ 5,119	\$ 5,221	\$ 5,325
Other -Obesity Grant purchases						
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Instructional Supplies and Resources</b>	\$ 89,827	\$ 73,770	\$ 75,996	\$ 78,136	\$ 80,299	\$ 82,485
<b>Support Supplies and Resources</b>						
Administrative Computers						
Administrative Software	\$ 620	\$ 1,000				
Administration Dues, fees, misc expenses	\$ 34,097	\$ 23,967	\$ 24,446	\$ 24,935	\$ 25,434	\$ 25,943
Office supplies	\$ 26,132	\$ 18,369	\$ 18,736	\$ 19,111	\$ 19,493	\$ 19,883
Other -Nurse supplies	\$ 2,232	\$ 2,277	\$ 2,323	\$ 2,369	\$ 2,416	\$ 2,464
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Support Supplies and Resources</b>	\$ 63,081	\$ 45,613	\$ 45,505	\$ 46,415	\$ 47,343	\$ 48,290
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreats						
Charter Board Supplies & Equipment						
Charter Board Dues, fees, etc	\$ 128	\$ 130	\$ 133	\$ 136	\$ 139	\$ 142
Other (please describe)						

Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Board Expenses</b>	\$ 128	\$ 130	\$ 133	\$ 136	\$ 139	\$ 142
<b>Professional Purchased or Contracted Services</b>						
Legal Services						
Audit Services (compliant with SBOA requirements)		\$ 3,000	\$ 3,000	\$ 3,333	\$ 3,333	\$ 3,333
Payroll Services	\$ 2,070	\$ 2,111	\$ 2,153	\$ 2,196	\$ 2,240	\$ 2,285
Accounting Services	\$ 750	\$ 667	\$ 667	\$ 833	\$ 833	\$ 833
Printing/Newsletter/Annual Report Services						
Consultants	\$ 2,829	\$ 2,885	\$ 2,943	\$ 3,002	\$ 3,062	\$ 3,123
Internet Services	\$ 11,532	\$ 5,400	\$ 5,508	\$ 5,618	\$ 5,730	\$ 5,845
Telephone/Telecommunication Services	\$ 13,907	\$ 14,185	\$ 14,469	\$ 14,758	\$ 15,053	\$ 15,354
Total Insurance Costs	\$ 12,559	\$ 12,810	\$ 13,066	\$ 13,327	\$ 13,594	\$ 13,866
Travel	\$ 4,113	\$ 4,195	\$ 4,279	\$ 4,365	\$ 4,452	\$ 4,541
Postage	\$ 1,712	\$ 1,746	\$ 1,781	\$ 1,817	\$ 1,853	\$ 1,890
Special Education Services	\$ 22,254	\$ 22,699	\$ 23,153	\$ 25,000	\$ 25,500	\$ 26,010
Student Services	\$ 8,748	\$ 8,922	\$ 9,100	\$ 9,282	\$ 9,468	\$ 9,657
Food service	\$ 4,746					
Transportation	\$ 8,280	\$ 4,223	\$ 4,307	\$ 4,393	\$ 4,481	\$ 4,571
Nursing Services						
Other - Athletic fees/dues	\$ 5,926	\$ 6,045	\$ 6,166	\$ 6,289	\$ 6,415	\$ 6,543
Other - Advertising	\$ 39,766	\$ 26,667	\$ 26,667	\$ 15,000	\$ 15,000	\$ 15,000
Other - Meals provided	\$ 6,390	\$ 6,518	\$ 6,648	\$ 6,781	\$ 6,917	\$ 7,055
Other - Rentals	\$ 9,091	\$ 9,273	\$ 9,458	\$ 9,647	\$ 9,840	\$ 10,037
<b>Total Professional Purchased or Contracted Services</b>	\$ 154,673	\$ 131,346	\$ 133,365	\$ 125,641	\$ 127,771	\$ 129,943
<b>Facilities</b>						
Rent, mortgage, or other facility cost		\$ 400,000	\$ 400,000	\$ 420,000	\$ 420,000	\$ 420,000
Furniture & Equipment						
Gas/electric	\$ 47,678	\$ 48,631	\$ 49,604	\$ 50,596	\$ 51,608	\$ 52,640
Water/Sewer	\$ 3,782	\$ 3,858	\$ 3,935	\$ 4,014	\$ 4,094	\$ 4,176
Grounds Keeping	\$ 10,466	\$ 10,675	\$ 10,889	\$ 11,107	\$ 11,329	\$ 11,556
Maintenance Services	\$ 28,663	\$ 29,236	\$ 29,821	\$ 30,417	\$ 31,025	\$ 31,646
Custodial	\$ 76,286	\$ 77,812	\$ 79,368	\$ 80,955	\$ 82,574	\$ 84,225
Waste disposal	\$ 1,961	\$ 2,001	\$ 2,041	\$ 2,082	\$ 2,124	\$ 2,124
Debt Service - GFF/Garatoni	\$ 22,413	\$ 22,861	\$ 23,318	\$ 23,784	\$ 23,784	\$ 23,784
Other Depreciation Expense						
Other (please describe)						
Other (please describe)						
Other (please describe)						



<b>Total Facilities</b>	\$ 191,248	\$ 595,074	\$ 598,976	\$ 622,955	\$ 626,538	\$ 630,151
<b>Other</b>						
Contingency						
Charter Administrative Fee	\$ 37,866	\$ 83,903	\$ 85,753	\$ 85,753	\$ 85,753	\$ 85,753
CMO/EMO Fee						
Common School Fund Loan Interest Costs						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Other</b>	\$ 37,866	\$ 83,903	\$ 85,753	\$ 85,753	\$ 85,753	\$ 85,753
<b>Total Expenditures</b>	\$ 2,341,185	\$ 3,102,467	\$ 3,163,163	\$ 3,183,517	\$ 3,193,371	\$ 3,203,340
<b>Carryover/Deficit</b>	\$ (270,042)	\$ 133,843	\$ 628,261	\$ 410,907	\$ 404,053	\$ 397,084
<b>Cumulative Carryover/(Deficit)</b>	\$ (270,042)	\$ (136,198)	\$ 492,063	\$ 902,971	\$ 1,307,024	\$ 1,704,109

Success Academy South Bend (Elementary)						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>REVENUE</b>						
<b>State Revenue</b>						
Basic Grant		\$ 2,361,611	\$ 3,489,924	\$ 3,489,924	\$ 3,489,924	\$ 3,489,924
State Matching Funds for School Lunch Program						
Professional Development						
Technology Grants						
Remediation Program						
Full-Day Kindergarten		\$ -	\$ -	\$ -	\$ -	\$ -
Gifted and Talented Program						
Textbook Reimbursement		\$ 18,000	\$ 22,000	\$ 23,000	\$ 24,000	\$ 25,000
Summer School						
Other State Revenue (please describe)						
Other State Revenue (please describe)						
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant		\$ 172,500	\$ -			
Facilities Assistance Program Grant						
Public Law 101-476 (IDEA)						
Title I		\$ 75,000	\$ 108,000	\$ 108,000	\$ 108,000	\$ 108,000
Title II						
Federal Lunch Program						
Federal Breakfast Reimbursement						
Other Revenue Federal sources - Spec Ed Part B		\$ 26,000	\$ 27,000	\$ 28,000	\$ 29,000	\$ 30,000
Other Revenue Federal sources (please describe)						
<b>Other Revenues</b>						
Committed Philanthropic Donations		\$ -				
Before and After Care Fees						
Interest Income						
Other Inc- Bus pass, student fee, con stand, athletic events		\$ 11,500	\$ 16,560	\$ 17,000	\$ 17,000	\$ 17,000
Other - Rental Income - Riverside Church						
Other - TIF Grant						
<b>Total Revenue</b>		\$ 2,664,611	\$ 3,913,484	\$ 3,665,924	\$ 3,667,924	\$ 3,669,924
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Wages, Benefits and Payroll Taxes		\$ 1,873,398	\$ 2,231,628	\$ 2,231,628	\$ 2,231,628	\$ 2,231,628
Substitute Teachers		\$ 10,000	\$ 11,000	\$ 12,000	\$ 13,000	\$ 14,000
Professional Development		\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000

Bonuses		\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000
Other - Athletic officials/referees						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Personnel Expenses</b>		\$ 2,033,398	\$ 2,392,628	\$ 2,393,628	\$ 2,394,628	\$ 2,395,628
<b>Instructional Supplies and Resources</b>						
Textbooks		\$ 43,000	\$ 22,000	\$ 23,000	\$ 24,000	\$ 25,000
Library, periodicals, etc						
Technology						
Assessment materials		\$ 2,000	\$ 2,040	\$ 2,081	\$ 2,123	\$ 2,165
Computers						
Software						
Other classroom supplies		\$ 40,000	\$ 40,800	\$ 41,616	\$ 42,448	\$ 43,297
Field trips, other unclassified items		\$ 4,000	\$ 4,000	\$ 4,560	\$ 4,651	\$ 4,744
Co-curricular & Athletics						
Other -Obesity Grant purchases						
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Instructional Supplies and Resources</b>		\$ 89,000	\$ 68,840	\$ 71,257	\$ 73,222	\$ 75,206
<b>Support Supplies and Resources</b>						
Administrative Computers						
Administrative Software		\$ 1,000				
Administration Dues, fees, misc expenses		\$ 23,967	\$ 24,446	\$ 24,935	\$ 25,434	\$ 25,943
Office supplies		\$ 18,369	\$ 18,736	\$ 19,111	\$ 19,493	\$ 19,883
Other -Nurse supplies		\$ 2,200	\$ 2,244	\$ 2,289	\$ 2,335	\$ 2,382
Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Support Supplies and Resources</b>		\$ 45,536	\$ 45,426	\$ 46,335	\$ 47,262	\$ 48,208
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreats						
Charter Board Supplies & Equipment						
Charter Board Dues, fees, etc		\$ 130	\$ 133	\$ 136	\$ 139	\$ 142
Other (please describe)						

Other (please describe)						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Board Expenses</b>		\$ 130	\$ 133	\$ 136	\$ 139	\$ 142
<b>Professional Purchased or Contracted Services</b>						
Legal Services						
Audit Services (compliant with SBOA requirements)		\$ 3,000	\$ 3,000	\$ 3,333	\$ 3,333	\$ 3,333
Payroll Services		\$ 2,200	\$ 2,244	\$ 2,289	\$ 2,335	\$ 2,382
Accounting Services		\$ 667	\$ 667	\$ 833	\$ 833	\$ 833
Printing/Newsletter/Annual Report Services						
Consultants						
Internet Services		\$ 4,500	\$ 4,590	\$ 4,682	\$ 4,776	\$ 4,872
Telephone/Telecommunication Services		\$ 14,000	\$ 14,280	\$ 14,566	\$ 14,857	\$ 15,154
Total Insurance Costs		\$ 15,000	\$ 15,300	\$ 15,606	\$ 15,918	\$ 16,236
Travel		\$ 2,000	\$ 2,040	\$ 2,081	\$ 2,123	\$ 2,165
Postage		\$ 500	\$ 510	\$ 520	\$ 530	\$ 541
Special Education Services		\$ 18,000	\$ 20,000	\$ 25,000	\$ 25,000	\$ 25,000
Student Services			\$ 2,000	\$ 3,000	\$ 3,000	\$ 3,000
Food service						
Transportation			\$ -	\$ -	\$ -	\$ -
Nursing Services						
Other - Athletic fees/dues						
Other - Advertising		\$ 26,667	\$ 26,667	\$ 15,000	\$ 15,000	\$ 15,000
Other - Meals provided		\$ 1,000	\$ 2,000	\$ 2,500	\$ 2,500	\$ 2,500
Other - Rentals		\$ 1,000	\$ 2,000	\$ 2,500	\$ 2,500	\$ 2,500
<b>Total Professional Purchased or Contracted Services</b>		\$ 88,534	\$ 95,298	\$ 91,910	\$ 92,705	\$ 93,516
<b>Facilities</b>						
Rent, mortgage, or other facility cost		\$ 60,000	\$ 550,000	\$ 550,000	\$ 550,000	\$ 550,000
Furniture & Equipment						\$ -
Gas/electric		\$ 70,000	\$ 71,400	\$ 72,828	\$ 74,285	\$ 75,771
Water/Sewer		\$ 6,000	\$ 6,120	\$ 6,242	\$ 6,367	\$ 6,494
Grounds Keeping		\$ 11,000	\$ 11,220	\$ 11,444	\$ 11,673	\$ 11,906
Maintenance Services		\$ 20,000	\$ 20,600	\$ 21,012	\$ 21,432	\$ 21,861
Custodial		\$ 150,000	\$ 151,000	\$ 152,000	\$ 153,000	\$ 154,000
Waste disposal		\$ 4,000	\$ 4,080	\$ 4,162	\$ 4,245	\$ 4,330
Debt Service - GFF/Garatoni						
Other Depreciation Expense						
Other (please describe)						
Other (please describe)						
Other (please describe)						

<b>Total Facilities</b>		\$ 321,000	\$ 814,420	\$ 817,688	\$ 821,002	\$ 824,362
<b>Other</b>						
Contingency						
Charter Administrative Fee		\$ 70,848	\$ 104,698	\$ 104,698	\$ 104,698	\$ 104,698
CMO/EMO Fee						
Common School Fund Loan Interest Costs						
Other (please describe)						
Other (please describe)						
Other (please describe)						
<b>Total Other</b>		\$ 70,848	\$ 104,698	\$ 104,698	\$ 104,698	\$ 104,698
<b>Total Expenditures</b>	\$ -	\$ 2,648,446	\$ 3,521,443	\$ 3,525,652	\$ 3,533,656	\$ 3,541,760
<b>Carryover/Deficit</b>	\$ -	\$ 16,165	\$ 392,041	\$ 140,272	\$ 134,268	\$ 128,164
<b>Cumulative Carryover/(Deficit)</b>	\$ -	\$ 16,165	\$ 408,206	\$ 548,478	\$ 682,746	\$ 810,909



	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
<b>Professional Purchased or Contracted Services</b>															
Legal Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Audit Services (compliant with SBOA requirements)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services	-	298.20	264.56	279.18	285.03	279.50	313.97	1,720.44	1,006.22	280.65	311.36	320.00	320.00	320.00	2,558.21
Accounting Services	-	-	-	-	-	-	-	-	-	1,500.00	-	-	-	-	1,500.00
Printing/Newsletter/Annual Report Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Consultants	-	-	2,319.93	(1,747.40)	-	1,150.01	100.00	1,822.54	4,694.00	-	2,019.90	-	2,020.00	-	8,733.90
Internet Services	-	1,892.99	7,515.05	6,391.06	770.33	5,302.56	240.00	22,112.00	-	480.00	929.25	-	320.00	-	1,729.25
Telephone/Telecommunication Services	-	1,800.95	1,948.64	1,987.60	1,956.60	2,737.75	2,118.37	12,549.92	2,094.27	4,331.07	2,587.54	2,395.86	2,395.86	2,395.86	16,200.47
Total Insurance Costs (per ICSB requirements detailed in charter school application)	-	3,351.00	5,653.49	-	-	5,653.49	-	14,657.98	-	5,653.49	-	-	5,653.49	-	11,306.97
Travel	-	1,674.43	6,574.55	4,866.38	4,147.36	-	201.95	17,464.67	2,235.32	1,000.69	10,311.30	470.00	650.00	2,170.00	16,837.31
Postage	-	-	272.48	317.66	254.45	248.44	596.95	1,689.98	49.03	247.68	667.66	294.95	294.92	294.92	1,849.16
Special Education Services	-	70.71	250.01	610.99	6,479.56	5,759.89	4,800.00	17,971.16	6,824.82	4,011.00	10,601.22	3,400.00	2,500.00	700.00	28,037.04
Student Services	-	-	15,445.36	5,397.15	2,909.00	158.00	1,665.00	25,574.51	1,250.00	1,575.00	70.00	750.00	750.00	-	4,395.00
Food service	-	-	-	-	-	-	9,811.25	9,811.25	-	-	-	-	-	-	-
Transportation	-	900.00	1,200.00	2,464.82	3,185.00	1,205.00	3,835.05	12,789.87	1,610.00	1,120.00	630.00	800.00	975.00	-	5,135.00
Nursing Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Athletic fees/dues	-	-	479.99	1,192.84	577.15	750.00	1,190.90	4,190.88	930.00	3,086.80	2,790.00	300.00	200.00	600.00	7,906.80
Other - Advertising	-	10,071.84	9,360.80	14,847.92	10,150.25	1,841.99	2,373.62	48,646.43	8,658.82	1,670.94	15,930.63	2,668.00	-	5,000.00	33,928.39
Other - Meals provided	-	16.05	5,046.67	225.02	1,113.67	449.75	2,018.76	8,869.91	229.41	628.90	1,583.40	1,300.00	500.00	100.00	4,341.71
Other - Rentals	-	265.00	908.92	3,263.90	1,473.32	712.66	5,630.82	12,254.62	1,039.32	3,938.99	862.11	300.00	200.00	200.00	6,540.42
<b>Total Professional Purchased or Contracted Services</b>	-	20,341.17	57,240.45	40,097.13	33,301.72	26,249.03	34,896.64	212,126.14	30,621.23	29,525.21	49,294.36	12,998.81	16,779.26	11,780.78	150,999.65
<b>Facilities</b>															
Rent, mortgage, or other facility cost	-	3,505.36	3,475.06	3,444.58	3,413.92	3,383.07	3,352.04	20,574.03	3,320.81	3,289.40	3,257.80	3,257.80	3,257.80	3,257.80	19,641.41
Furniture & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gas/electric	-	6,552.18	5,958.25	6,514.31	8,188.08	7,733.60	8,841.55	43,787.97	10,554.19	9,758.23	11,697.76	9,490.69	6,690.00	6,590.00	54,780.87
Water/ Sewer	-	765.12	432.40	745.24	607.53	967.13	607.53	4,124.95	588.23	499.17	653.74	651.00	651.00	651.00	3,694.14
Grounds Keeping	-	450.00	360.00	1,440.00	2,210.00	360.00	2,738.40	7,558.40	-	1,827.15	3,251.05	2,800.00	3,000.00	3,200.00	14,078.20
Maintenance Services	-	2,363.00	10,248.37	4,134.49	2,481.52	7,487.88	4,661.58	31,376.84	6,083.91	7,588.00	4,400.00	4,400.00	4,400.00	4,400.00	27,880.26
Custodial	-	10,448.00	10,448.00	10,448.00	10,448.00	12,402.00	12,202.00	66,396.00	12,302.00	12,302.00	29,807.69	12,302.00	12,302.00	12,302.00	91,317.69
Waste disposal	-	250.00	250.00	267.50	463.67	353.00	353.00	1,937.17	353.00	353.00	353.00	353.00	353.00	353.00	2,118.00
Debt Service - GFF/Garotoni	-	7,626.88	7,583.86	7,287.28	7,578.13	7,454.80	7,655.97	45,186.92	6,835.76	6,415.78	7,177.86	7,177.86	7,177.86	7,177.86	41,962.98
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Facilities</b>	-	31,960.54	38,755.94	34,281.40	35,390.85	40,141.48	40,412.07	220,942.28	40,037.90	35,453.08	63,786.90	40,432.35	37,831.66	37,931.66	255,473.55
<b>Other</b>															
Contingency	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Indiana Charter School Board Administrative Fee (0% in Year 0)	-	-	4,587.00	4,587.00	4,587.00	4,587.00	8,818.52	27,166.52	561.92	14,254.10	11,995.01	5,997.50	5,997.50	5,997.50	44,803.53
CMO/EMO Fee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Other</b>	-	-	4,587.00	4,587.00	4,587.00	4,587.00	8,818.52	27,166.52	561.92	14,254.10	11,995.01	5,997.50	5,997.50	5,997.50	44,803.53
<b>Total Expenditures</b>	\$ -	\$ 373,860	\$ 473,776	\$ 470,741	\$ 468,461	\$ 441,493	\$ 462,575	\$ 2,690,907	\$ 429,866	\$ 434,048	\$ 473,635	\$ 397,218	\$ 395,383	\$ 377,834	\$ 2,507,984
<b>Net Income (Pre-Cash Flow Adjustments)</b>	\$ -	\$ (72,699)	\$ (99,714)	\$ (191,587)	\$ (214,516)	\$ 127,819	\$ 966,330	\$ 515,633	\$ (99,600)	\$ (21,123)	\$ (143,569)	\$ (118,636)	\$ (98,801)	\$ (102,002)	\$ (583,731)
<b>CASH FLOW ADJUSTMENTS</b>															
<b>OPERATING ACTIVITIES</b>															
Example - Add Back Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Donation conversion of note	-	-	-	-	-	-	-	(1,000,000.00)	(1,000,000.00)	-	-	-	-	-	-
<b>Total Operating Activities</b>	-	-	-	-	-	-	-	(1,000,000.00)	(1,000,000.00)	-	-	-	-	-	-
<b>INVESTMENT ACTIVITIES</b>															
Example - Subtract Property and Equipment Expenditures	-	-	(24,096.44)	(69,125.00)	(15,388.00)	(45,839.06)	(61,848.78)	(216,297.28)	(75,656.00)	-	(15,710.25)	-	-	-	(91,366.25)
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Investment Activities</b>	-	-	(24,096.44)	(69,125.00)	(15,388.00)	(45,839.06)	(61,848.78)	(216,297.28)	(75,656.00)	-	(15,710.25)	-	-	-	(91,366.25)
<b>FINANCING ACTIVITIES</b>															
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	50,000.00	200,000.00	-	250,000.00	65,000.00	325,000.00	50,000.00	200,000.00	-	-	640,000.00
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Financing Activities</b>	-	-	-	-	50,000.00	200,000.00	-	250,000.00	65,000.00	325,000.00	50,000.00	200,000.00	-	-	640,000.00

	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
<b>Total Cash Flow Adjustments</b>	-	-	(24,096.44)	(69,125.00)	34,612.00	154,160.94	(1,061,848.78)	(966,297.28)	(10,656.00)	325,000.00	34,289.75	200,000.00	-	-	548,633.75
<b>NET INCOME</b>	\$ -	\$ (72,699.49)	\$ (123,810.08)	\$ (260,712.16)	\$ (179,904.29)	\$ 281,980.43	\$ (95,518.93)	\$ (450,664.53)	\$ (110,255.98)	\$ 303,877.43	\$ (109,279.58)	\$ 81,363.81	\$ (98,800.89)	\$ (102,002.42)	\$ (35,097.62)
<b>Beginning Cash Balance</b>	-	617,233.90	544,534.41	420,724.33	160,012.17	(19,892.13)	262,088.29	\$ 617,233.90	166,569.36	56,313.38	360,190.77	250,911.19	332,275.00	233,474.11	166,569.36
<b>ENDING CASH BALANCE</b>	\$ -	\$ 544,534.41	\$ 420,724.33	\$ 160,012.17	\$ (19,892.12)	\$ 262,088.30	\$ 166,569.36	\$ 166,569.37	\$ 56,313.38	\$ 360,190.81	\$ 250,911.19	\$ 332,275.00	\$ 233,474.11	\$ 131,471.69	\$ 131,471.74







	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
Total Financing Activities	-	-	-	-	25,000.00	100,000.00	-	125,000.00	32,500.00	325,000.00	50,000.00	100,000.00	-	-	507,500.00
<b>Total Cash Flow Adjustments</b>	-	-	(24,096.44)	(69,125.00)	9,612.00	54,160.94	(811,848.78)	(841,297.28)	(43,156.00)	325,000.00	34,289.75	100,000.00	-	-	416,133.75
<b>NET INCOME</b>	\$ -	\$ (40,839.81)	\$ (22,556.00)	\$ (184,573.36)	\$ (110,420.18)	\$ 177,062.89	\$ (91,262.02)	\$ (272,588.48)	\$ (105,888.36)	\$ 307,510.74	\$ (51,378.69)	\$ 14,509.21	\$ (56,631.58)	\$ (58,753.38)	\$ 49,367.94
<b>Beginning Cash Balance</b>	-	318,677.86	277,838.05	255,282.05	70,708.69	(39,711.49)	137,351.40	318,677.86	46,089.38	(59,798.98)	247,711.76	196,333.07	210,842.28	154,210.70	46,089.38
<b>ENDING CASH BALANCE</b>	\$ -	\$ 277,838.05	\$ 255,282.05	\$ 70,708.69	\$ (39,711.49)	\$ 137,351.40	\$ 46,089.38	\$ 46,089.38	\$ (59,798.98)	\$ 247,711.76	\$ 196,333.07	\$ 210,842.28	\$ 154,210.70	\$ 95,457.32	\$ 95,457.32

### Career Academy South Bend Middle School

Expected New School Annual Operating Budget and Cash Flow Projections -- YEAR 0 -- Pre-Opening Period															
	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
<b>REVENUE</b>															
<b>Federal Revenue</b>															
Public Charter School Program (PCSP) Grant (NOTE: this is a competitive grant. Funding is not guaranteed.)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue Federal sources - Title I	-	11,761.53	-	11,305.70	2,782.02	816.18	4,109.29	30,774.73	6,716.51	3,069.71	4,959.09	4,063.08	3,144.05	3,385.90	25,338.34
Other Revenue Federal sources - Special Ed Part B	-	9,857.86	-	-	-	-	3,943.19	13,801.06	-	-	-	-	9,674.00	-	9,674.00
<b>Other Revenues</b>															
Committed Philanthropic Donations	-	1,500.00	75.00	1,431.00	-	-	250,000.00	253,006.00	2,500.00	-	-	-	-	-	2,500.00
Basic Grant	-	112,062.28	112,062.29	112,062.29	112,062.29	203,000.79	185,103.88	836,353.82	142,375.12	179,196.29	146,977.77	143,671.19	125,290.60	125,290.59	862,801.57
Other -Textbook Reimbursement	-	-	-	-	-	-	-	-	-	11,322.48	-	-	-	-	11,322.48
Other Inc - Bus pass, student fee, con stand, athletic events	-	1,925.57	521.71	1,728.43	827.18	3,330.80	6,514.46	14,848.14	2,270.98	1,964.56	3,536.99	1,217.31	1,168.94	564.31	10,723.09
Other - Rental Income - Riverside Church	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - TIF Grant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Revenue</b>	-	137,107.24	112,658.99	126,527.42	115,671.48	207,147.77	449,670.83	1,148,783.74	153,862.61	195,553.04	155,473.85	148,951.58	139,277.59	129,240.80	922,359.47
<b>EXPENDITURES</b>															
<b>Personnel Expenses</b>															
Wages, Benefits and Payroll Taxes (TOTAL must match "Staffing Year 0")	-	146,454.75	146,454.75	146,454.75	146,454.75	146,454.75	146,454.75	878,728.50	146,454.75	146,454.75	146,454.75	146,454.75	146,454.75	146,454.75	878,728.50
Professional Development	-	-	7,500.00	-	-	-	-	7,500.00	-	-	-	-	-	-	-
Substitute Teachers	-	664.48	3,429.27	2,666.68	3,933.53	3,954.42	4,253.01	18,901.39	6,266.10	4,109.26	2,908.34	2,500.00	2,500.00	-	18,283.70
Other - Athletic officials/referees	-	-	-	260.00	400.00	280.00	530.00	1,470.00	210.00	180.00	160.00	100.00	100.00	-	750.00
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Personnel Expenses</b>	-	147,119.23	157,384.02	149,381.43	150,788.28	150,689.17	151,237.76	906,599.89	152,930.85	150,744.01	149,523.09	149,054.75	149,054.75	146,454.75	897,762.20
<b>Instructional Supplies and Resources</b>															
Textbooks	-	-	16,086.25	4,418.95	7,003.15	3,598.62	1,901.48	33,008.45	2,034.18	-	-	-	-	-	2,034.18
Library, periodicals, etc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Assessment materials	-	-	-	-	-	-	3,492.60	3,492.60	-	-	-	-	-	-	-
Computers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other classroom supplies	-	-	1,091.54	6,046.71	10,533.56	7,467.54	2,075.27	27,214.62	1,280.66	6,083.70	3,695.45	3,072.56	2,596.74	-	16,729.11
Field trips, other unclassified items	-	-	-	-	2,465.39	-	-	2,465.39	-	-	58.04	-	-	-	58.04
Co-curricular & Athletics	-	-	59.95	114.02	1,443.90	504.91	2,186.69	4,309.47	272.92	66.14	76.26	50.00	50.00	-	515.32
Other -Obesity Grant purchases	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Instructional Supplies and Resources</b>	-	-	17,237.74	10,579.68	21,446.00	11,571.07	9,656.04	70,490.53	3,587.76	6,149.84	3,829.75	3,122.56	2,646.74	-	19,336.65
<b>Support Supplies and Resources</b>															
Administrative Computers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administrative Software	-	-	-	620.34	-	-	-	620.34	-	-	-	-	-	-	-
Administration Dues, fees, misc expenses	-	637.58	1,204.09	4,496.24	4,002.38	4,506.15	1,817.40	16,663.84	3,345.61	2,286.49	5,461.77	2,730.49	2,433.01	1,175.39	17,432.76
Office supplies	-	438.25	886.13	3,913.27	2,017.39	4,604.94	3,772.23	15,632.21	2,803.35	3,831.56	720.66	1,039.96	532.07	1,572.00	10,499.60

	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
Other -Nurse supplies	-	-	-	1,107.62	242.83	70.36	99.22	1,520.03	-	259.20	259.70	-	193.48	-	712.38
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Support Supplies and Resources</b>	-	1,075.83	2,090.22	10,137.47	6,262.60	9,181.45	5,688.85	34,436.42	6,148.96	6,377.25	6,442.13	3,770.45	3,158.56	2,747.39	28,644.74
<b>Board Expenses</b>															
Charter Board Services, including Board Training, retreats	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Charter Board Supplies & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Charter Board Dues, fees, etc	-	-	11.61	11.61	11.61	11.61	11.61	58.05	11.61	11.61	11.61	11.61	11.61	11.61	69.66
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Board Expenses</b>	-	-	11.61	11.61	11.61	11.61	11.61	58.05	11.61	11.61	11.61	11.61	11.61	11.61	69.66
<b>Professional Purchased or Contracted Services</b>															
Legal Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Audit Services (compliant with SBOA requirements)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services	-	144.24	127.97	135.04	137.87	135.19	151.87	832.18	486.71	135.75	150.60	154.78	154.78	154.78	1,237.40
Accounting Services	-	-	-	-	-	-	-	-	-	750.00	-	-	-	-	750.00
Printing/Newsletter/Annual Report Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Consultants	-	-	1,122.15	(852.25)	-	556.26	48.37	874.53	-	-	977.04	-	977.07	-	1,954.11
Internet Services	-	915.64	3,635.03	3,091.36	372.61	2,564.85	116.09	10,695.58	-	232.18	449.48	-	154.78	-	836.44
Telephone/Telecommunication Services	-	871.12	942.56	961.40	946.41	1,324.25	1,024.66	6,070.40	1,013.00	2,094.94	1,251.59	1,158.88	1,158.88	1,158.88	7,836.17
Total Insurance Costs (per ICSB requirements detailed in charter school application)	-	1,620.88	2,734.59	-	-	2,734.59	-	7,090.06	-	2,734.59	-	-	2,734.59	-	5,469.18
Travel	-	70.00	1,447.17	85.82	312.13	-	97.69	2,012.81	90.68	394.55	1,087.63	227.34	217.67	82.23	2,100.10
Postage	-	-	131.80	153.65	123.08	120.17	288.74	817.44	23.72	119.80	322.95	142.67	142.65	142.65	894.44
Special Education Services	-	34.20	120.93	295.54	3,134.16	2,786.00	2,321.76	8,692.59	3,301.17	1,940.12	5,127.81	1,644.58	1,209.25	338.59	13,561.52
Student Services	-	-	1,034.32	1,892.20	2,204.50	79.00	725.00	5,935.02	625.00	787.50	-	700.00	700.00	-	2,812.50
Food service	-	-	-	-	-	-	4,745.70	4,745.70	-	-	-	-	-	-	-
Transportation	-	-	600.00	1,094.91	1,602.50	250.00	1,342.53	4,889.94	895.00	865.00	630.00	500.00	500.00	-	3,390.00
Nursing Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Athletic fees/dues	-	-	-	1,042.84	369.65	400.00	559.00	2,371.49	365.00	1,750.00	940.00	-	-	500.00	3,555.00
Other - Advertising	-	4,871.75	4,527.82	7,181.94	4,909.68	614.31	1,186.82	23,292.32	4,251.27	808.24	7,705.64	1,290.51	-	2,418.50	16,474.16
Other - Meals provided	-	7.76	2,441.07	108.84	538.68	217.54	976.47	4,290.36	110.97	304.20	765.89	628.81	241.85	48.37	2,100.09
Other - Rentals	-	128.18	439.64	1,578.75	712.64	344.71	2,723.63	5,927.56	502.72	1,905.29	417.00	145.11	96.74	96.74	3,163.60
<b>Total Professional Purchased or Contracted Services</b>	-	8,663.77	19,305.05	16,770.04	15,363.91	12,126.87	16,308.33	88,537.98	11,665.24	14,822.16	19,825.63	6,592.68	8,288.26	4,940.74	66,134.71
<b>Facilities</b>															
Rent, mortgage, or other facility cost	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Furniture & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gas/electric	-	3,169.29	2,882.01	3,150.97	3,960.57	3,740.74	4,276.66	21,180.24	5,105.06	4,720.06	5,658.21	4,590.65	3,235.95	3,187.58	26,497.51
Water/ Sewer	-	370.09	209.15	360.47	293.86	467.80	293.86	1,995.24	284.53	241.45	316.21	314.89	314.89	314.89	1,786.86
Grounds Keeping	-	217.67	174.13	696.53	1,068.98	174.13	1,324.56	3,656.00	-	883.79	1,572.53	1,354.36	1,451.10	1,547.84	6,809.63
Maintenance Services	-	1,142.98	4,957.14	1,999.85	1,200.31	3,621.89	2,254.81	15,176.98	2,942.79	487.74	3,670.32	2,128.28	2,128.28	2,128.28	13,485.68
Custodial	-	5,053.70	5,053.70	5,053.70	5,053.70	5,998.85	5,902.11	32,115.75	5,950.48	5,950.48	14,417.98	5,950.48	5,950.48	5,950.48	44,170.37
Waste disposal	-	120.93	120.93	129.39	224.28	170.75	170.75	937.01	170.75	170.75	170.75	170.75	170.75	170.75	1,024.48
Debt Service - GFF/Garotoni	-	2,033.45	2,010.40	1,918.10	2,004.52	1,998.93	2,040.41	12,005.80	1,628.77	1,590.53	1,796.89	1,796.89	1,796.89	1,796.89	10,406.83
Other Depreciation Expense	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Facilities</b>	-	12,108.09	15,407.45	13,309.01	13,806.21	16,173.09	16,263.15	87,067.00	16,082.36	14,044.78	27,602.88	16,306.28	15,048.33	15,096.70	104,181.34
<b>Other</b>															
Contingency	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Indiana Charter School Board Administrative Fee (0% in Year 0)	-	-	2,476.98	2,476.98	2,476.98	2,476.98	4,762.00	14,669.92	303.44	7,036.69	6,139.65	3,238.65	3,238.65	3,238.65	23,195.73
CMO/EMO Fee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Other</b>	-	-	2,476.98	2,476.98	2,476.98	2,476.98	4,762.00	14,669.92	303.44	7,036.69	6,139.65	3,238.65	3,238.65	3,238.65	23,195.73
<b>Total Expenditures</b>	\$ -	\$ 168,967	\$ 213,913	\$ 202,666	\$ 210,156	\$ 202,230	\$ 203,928	\$ 1,201,860	\$ 190,730	\$ 199,186	\$ 213,375	\$ 182,097	\$ 181,447	\$ 172,490	\$ 1,139,325

	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL 2014	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	TOTAL FIRST HALF 2015
<b>Net Income (Pre-Cash Flow Adjustments)</b>	\$ -	\$ (31,860)	\$ (101,254)	\$ (76,139)	\$ (94,484)	\$ 4,918	\$ 245,743	\$ (53,076)	\$ (36,868)	\$ (3,633)	\$ (57,901)	\$ (33,145)	\$ (42,169)	\$ (43,249)	\$ (216,966)
<b>CASH FLOW ADJUSTMENTS</b>															
<b>OPERATING ACTIVITIES</b>															
Example - Add Back Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Donation conversion of note	-	-	-	-	-	-	(250,000.00)	(250,000.00)	-	-	-	-	-	-	-
<b>Total Operating Activities</b>	-	-	-	-	-	-	(250,000.00)	(250,000.00)	-	-	-	-	-	-	-
<b>INVESTMENT ACTIVITIES</b>															
Example - Subtract Property and Equipment Expenditures	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Investment Activities</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>FINANCING ACTIVITIES</b>															
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	25,000.00	100,000.00	-	125,000.00	32,500.00	-	-	100,000.00	-	-	132,500.00
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Financing Activities</b>	-	-	-	-	25,000.00	100,000.00	-	125,000.00	32,500.00	-	-	100,000.00	-	-	132,500.00
<b>Total Cash Flow Adjustments</b>	-	-	-	-	25,000.00	100,000.00	(250,000.00)	(125,000.00)	32,500.00	-	-	100,000.00	-	-	132,500.00
<b>NET INCOME</b>	\$ -	\$ (31,859.68)	\$ (101,254.08)	\$ (76,138.80)	\$ (69,484.12)	\$ 104,917.53	\$ (4,256.91)	\$ (178,076.05)	\$ (4,367.62)	\$ (3,633.31)	\$ (57,900.89)	\$ 66,854.60	\$ (42,169.31)	\$ (43,249.04)	\$ (84,465.56)
<b>Beginning Cash Balance</b>	-	298,556.04	266,696.36	165,442.28	89,303.48	19,819.36	124,736.89	298,556.04	120,479.98	116,112.36	112,479.01	54,578.12	121,432.72	79,263.41	120,479.98
<b>ENDING CASH BALANCE</b>	\$ -	\$ 266,696.36	\$ 165,442.28	\$ 89,303.48	\$ 19,819.36	\$ 124,736.89	\$ 120,479.98	\$ 120,479.98	\$ 116,112.36	\$ 112,479.05	\$ 54,578.12	\$ 121,432.72	\$ 79,263.41	\$ 36,014.37	\$ 36,014.41









## Career Academy South Bend High School

### Expected Charter School Staffing Needs -- Year 0 -- Pre-Opening Period

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
are calculated based on 24% of salary.					
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	52,083	52,083	12,500	64,583
Assistant to Superintendent	1	18,500	18,500	4,440	22,940
Director of IT	1	49,000	49,000	11,760	60,760
IT Support Tech	1	17,500	17,500	4,200	21,700
Director of Facilities	1	30,000	30,000	7,200	37,200
Assistant facilities	1	25,000	25,000	6,000	31,000
Director of Special Education	1	34,000	34,000	8,160	42,160
Director of HR	1	27,500	27,500	6,600	34,100
Director of Student Services	1	30,000	30,000	7,200	37,200
Director of Curriculum	1	40,000	40,000	9,600	49,600
Director of Development	1	35,000	35,000	8,400	43,400
Development Coordinator	1	17,500	17,500	4,200	21,700
Director of Career Development	1	30,000	30,000	7,200	37,200
Assistant Business Manager	1	25,500	25,500	6,120	31,620
Accounting Clerk	1	17,500	17,500	4,200	21,700
Buyer	1	14,500	14,500	3,480	17,980
Data Coordinator	1	19,000	19,000	4,560	23,560
Nurse	1	19,810	19,810	4,754	24,564
Security	1	13,000	13,000	3,120	16,120
Counselor	1	33,114	33,114	7,947	41,061
Social worker	1	21,538	21,538	5,169	26,707
Admin support	6	15,317	91,900	22,056	113,956
Assistant Principal HS/MS	1	30,000	30,000	7,200	37,200
Special Education teacher	5	22,754	113,769	27,305	141,074

Special Education para	2	13,500	27,000	6,480	33,480
Welding Instructor	1	51,250	51,250	12,300	63,550
Title I para	3	16,495	49,486	11,877	61,363
Foreign Language	1	18,900	18,900	4,536	23,436
Math HS	6	44,617	267,705	64,249	331,954
In house Sub	2	16,000	32,000	7,680	39,680
Music	1	16,000	16,000	3,840	19,840
Business	1	35,000	35,000	8,400	43,400
Science HS	1	42,800	42,800	10,272	53,072
PE	1	16,000	16,000	3,840	19,840
History HS	2	22,003	44,007	10,562	54,568
PLTW	2	47,000	94,000	22,560	116,560
Social Studies HS	1	39,461	39,461	9,471	48,932
Band	1	16,824	16,824	4,038	20,862
Language Arts HS	2	34,685	69,370	16,649	86,019
Drama	1	19,310	19,310	4,634	23,944
			-		-
			-		-
			-		-
<b>TOTAL</b>			1,644,827	394,758	2,039,585

## Career Academy South Bend Middle School

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. are calculated based on 24% of salary.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	52,083	52,083	12,500	64,583
Assistant to Superintendent	1	18,500	18,500	4,440	22,940
Director of IT	1	49,000	49,000	11,760	60,760
IT Support Tech	1	17,500	17,500	4,200	21,700
Director of Facilities	1	30,000	30,000	7,200	37,200
Assistant facilities	1	25,000	25,000	6,000	31,000
Director of Special Education	1	34,000	34,000	8,160	42,160
Director of HR	1	27,500	27,500	6,600	34,100
Director of Student Services	1	30,000	30,000	7,200	37,200
Director of Curriculum	1	40,000	40,000	9,600	49,600
Director of Development	1	35,000	35,000	8,400	43,400
Development Coordinator	1	17,500	17,500	4,200	21,700
Director of Career Development	1	30,000	30,000	7,200	37,200
Assistant Business Manager	1	25,500	25,500	6,120	31,620
Accounting Clerk	1	17,500	17,500	4,200	21,700
Buyer	1	14,500	14,500	3,480	17,980
Data Coordinator	1	19,000	19,000	4,560	23,560
Nurse	1	19,810	19,810	4,754	24,564
Security	1	13,000	13,000	3,120	16,120
Counselor	1	33,114	33,114	7,947	41,061
Social worker	1	21,538	21,538	5,169	26,707
Admin support	6	15,317	91,899	22,056	113,955
Assistant Principal HS/MS	1	30,000	30,000	7,200	37,200
Special Education teacher	5	22,754	113,769	27,305	141,074
Special Education para	2	13,500	27,000	6,480	33,480
Title 1 para	3	16,495	49,486	11,877	61,363
Foreign Language	1	18,900	18,900	4,536	23,436
In house Sub	2	16,000	32,000	7,680	39,680

Music	1	16,000	16,000	3,840	19,840
Math MS	4	43,700	174,800	41,952	216,752
PE	1	16,000	16,000	3,840	19,840
Social Studies MS	1	36,614	36,614	8,787	45,402
Band	1	16,824	16,824	4,038	20,862
Language Arts MS	3	34,012	102,036	24,489	126,525
Science MS	2	51,310	102,620	24,629	127,249
Drama	1	19,310	19,310	4,634	23,944
			-		-
			-		-
			-		-
<b>TOTAL</b>			1,417,304	340,153	1,757,457

## Career Academy South Bend Inc - All Schools

Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1, 2015 - June 30, 2016		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 8,034,112	
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Full-Day Kindergarten	\$ -	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ 53,777	
Summer School	\$ 30,000	
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant	\$ 172,500	NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.
Charter School Facilities Assistance Program Grant	\$ 400,000	
Public Law 101-476 (IDEA)	\$ -	
Title I	\$ 252,304	
Title II	\$ -	
Federal Lunch Program	\$ -	
Federal Breakfast Reimbursement	\$ -	
Other Revenue Federal sources - Spec Ed Part B	\$ 80,000	
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 75,486	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary	\$ 60,000	
<b>Total Revenue</b>	<b>\$ 9,572,479</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 5,963,130	Use staffing workbook
Substitute Teachers	\$ 30,000	
Professional Development	\$ 30,000	
Bonuses	\$ 420,000	
Other - Athletic officials/referees	\$ 5,854	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 6,448,984</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 78,777	

Library, periodicals, etc	\$	-
Technology	\$	-
Assessment materials	\$	9,124
Computers	\$	-
Software	\$	-
Other classroom supplies	\$	215,876
Field trips, other unclassified items	\$	9,321
Co-curricular & Athletics	\$	17,131
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	330,229
<b>Support Supplies and Resources</b>		
Administrative Computers	\$	-
Administrative Software	\$	3,000
Administration Dues, fees, misc expenses	\$	71,901
Office supplies	\$	55,107
Other - Nurse supplies	\$	6,908
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Support Supplies and Resources</b>	\$	136,916
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$	-
Charter Board Supplies & Equipment	\$	-
Charter Board Dues, fees, etc	\$	399
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Board Expenses</b>	\$	399
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$	-
Audit Services (compliant with SBOA requirements)	\$	9,000
Payroll Services	\$	6,564
Accounting Services	\$	2,001
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	10,767
Internet Services	\$	15,700
Telephone/Telecommunication Services	\$	43,326
Total Insurance Costs	\$	41,484
Travel	\$	21,591
Postage	\$	4,110
Special Education Services	\$	64,928
Student Information Services	\$	30,568
Food service	\$	-
Transportation	\$	9,142
Nursing Services	\$	-
Other - Athletic fees/dues	\$	12,340
Other - Advertising	\$	80,001
Other - Meals provided	\$	14,476
Other - Rentals	\$	20,171

<b>Total Professional Purchased or Contracted Services</b>	\$	386,169	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	499,000	
Furniture & Equipment	\$	-	
Gas/electric	\$	170,540	
Water/ Sewer	\$	13,976	
Grounds Keeping	\$	33,069	
Maintenance Services	\$	80,442	
Custodial	\$	310,868	
Waste disposal	\$	8,137	
Debt Service - GFF/Garatoni (Interest Only)	\$	88,893	
Depreciation Expense	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Facilities</b>	\$	1,204,925	
<b>Other</b>			
Contingency	\$	-	
Charter Administrative Fee	\$	241,023	Assume 3% of Basic Grant (Row 6)
			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$	-	
Common School Fund Loan Interest Costs	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Other</b>	\$	241,023	
<b>Total Expenditures</b>	\$	8,748,645	
<b>Carryover/Deficit</b>	\$	823,834	

Cumulative Carryover/(Deficit) \$ 755,735

## Career Academy South Bend High School

Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1, 2015 - June 30, 2016		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,875,737	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 17,887	
Summer School	\$ 15,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.
Charter School Facilities Assistance Program Grant	\$ 200,000	
Public Law 101-476 (IDEA)		
Title I	\$ 88,645	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 28,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 31,989	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,671,558</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,079,365	Use staffing workbook
Substitute Teachers	\$ 10,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 3,590	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,242,955</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 17,887	



Library, periodicals, etc		
Technology		
Assessment materials	\$	3,562
Computers		
Software		
Other classroom supplies	\$	131,053
Field trips, other unclassified items	\$	2,747
Co-curricular & Athletics	\$	12,210
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	167,459
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software	\$	1,000
Administration Dues, fees, misc expenses	\$	23,967
Office supplies	\$	18,369
Other -Nurse supplies	\$	2,431
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,767
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	139
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	139
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,253
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services		
Consultants	\$	7,882
Internet Services	\$	5,800
Telephone/Telecommunication Services	\$	15,141
Total Insurance Costs	\$	13,674
Travel	\$	15,396
Postage	\$	1,864
Special Education Services	\$	24,229
Student Information Services	\$	21,646
Food service	\$	-
Transportation	\$	4,919
Nursing Services	\$	-
Other - Athletic fees/dues	\$	6,295
Other - Advertising	\$	26,667
Other - Meals provided	\$	6,958
Other - Rentals	\$	9,898

<b>Total Professional Purchased or Contracted Services</b>	\$	166,289	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	39,000	
Furniture & Equipment			
Gas/electric	\$	51,909	
Water/ Sewer	\$	4,118	
Grounds Keeping	\$	11,394	
Maintenance Services	\$	31,206	
Custodial	\$	83,056	
Waste disposal	\$	2,136	
Debt Service - GFF/Garatoni (Interest Only)	\$	66,032	
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	288,851	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	86,272	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	86,272	
<b>Total Expenditures</b>	\$	2,997,732	
<b>Carryover/Deficit</b>	\$	673,826	

Cumulative Carryover/(Deficit) \$ 875,769

## Career Academy South Bend Middle School

Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1, 2015 - June 30, 2016		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,796,764	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 17,890	
Summer School	\$ 15,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.
Charter School Facilities Assistance Program Grant	\$ 200,000	
Public Law 101-476 (IDEA)		
Title I	\$ 88,659	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 26,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 31,997	
Other - Rental Income - Riverside Church		
Other - Rental Income - Middle School		
Other - Rental Income - Elementary	\$ 60,000	
<b>Total Revenue</b>	<b>\$ 3,236,310</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,010,367	Use staffing workbook
Substitute Teachers	\$ 10,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 2,264	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,172,631</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 17,890	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,562
Computers		
Software		
Other classroom supplies	\$	44,823
Field trips, other unclassified items	\$	2,574
Co-curricular & Athletics	\$	4,921
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	73,770
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software	\$	1,000
Administration Dues, fees, misc expenses	\$	23,967
Office supplies	\$	18,369
Other -Nurse supplies	\$	2,277
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,613
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	130
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	130
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,111
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	2,885
Internet Services	\$	5,400
Telephone/Telecommunication Services	\$	14,185
Total Insurance Costs	\$	12,810
Travel	\$	4,195
Postage	\$	1,746
Special Education Services	\$	22,699
Student Information Services	\$	8,922
Food service	\$	-
Transportation	\$	4,223
Nursing Services	\$	-
Other - Athletic fees/dues	\$	6,045
Other - Advertising	\$	26,667
Other - Meals provided	\$	6,518
Other - Rentals	\$	9,273

<b>Total Professional Purchased or Contracted Services</b>	\$	131,346	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	400,000	
Furniture & Equipment			
Gas/electric	\$	48,631	
Water/ Sewer	\$	3,858	
Grounds Keeping	\$	10,675	
Maintenance Services	\$	29,236	
Custodial	\$	77,812	
Waste disposal	\$	2,001	
Debt Service - GFF/Garatoni (Interest Only)	\$	22,861	
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	595,074	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	83,903	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	83,903	
<b>Total Expenditures</b>	\$	3,102,467	
<b>Carryover/Deficit</b>	\$	133,843	

Cumulative Carryover/(Deficit) \$ (136,199)

## Success Academy South Bend - Elementary

Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1, 2015 - June 30, 2016		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,361,611	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 18,000	
Summer School		
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant	\$ 172,500	NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact Jeff Barber at the IDOE with questions.
Charter School Facilities Assistance Program Grant		
Public Law 101-476 (IDEA)		
Title I	\$ 75,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 26,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 11,500	
Other - Rental Income - Riverside Church		
Other - Rental Income - Middle School		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 2,664,611</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 1,873,398	Use staffing workbook
Substitute Teachers	\$ 10,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ -	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,033,398</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 43,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	2,000
Computers		
Software		
Other classroom supplies	\$	40,000
Field trips, other unclassified items	\$	4,000
Co-curricular & Athletics		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	89,000
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software	\$	1,000
Administration Dues, fees, misc expenses	\$	23,967
Office supplies	\$	18,369
Other -Nurse supplies	\$	2,200
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,536
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	130
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	130
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,200
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,500
Telephone/Telecommunication Services	\$	14,000
Total Insurance Costs	\$	15,000
Travel	\$	2,000
Postage	\$	500
Special Education Services	\$	18,000
Student Information Services		
Food service		
Transportation		
Nursing Services		
Other - Athletic fees/dues		
Other - Advertising	\$	26,667
Other - Meals provided	\$	1,000
Other - Rentals	\$	1,000

<b>Total Professional Purchased or Contracted Services</b>	\$	88,534	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	60,000	
Furniture & Equipment			
Gas/electric	\$	70,000	
Water/ Sewer	\$	6,000	
Grounds Keeping	\$	11,000	
Maintenance Services	\$	20,000	
Custodial	\$	150,000	
Waste disposal	\$	4,000	
Debt Service - GFF/Garatoni (Interest Only)			
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	321,000	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	70,848	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	70,848	
<b>Total Expenditures</b>	\$	2,648,446	
<b>Carryover/Deficit</b>	\$	16,165	

Cumulative Carryover/(Deficit) \$ 16,165



# Career Academy South Bend High School

## Expected Charter School Staffing Needs -- Year 1

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. are calculated based on 24% of salary.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	41,667	41,667	10,000	51,667
Assistant to Superintendent	1	12,333	12,333	2,960	15,293
Director of IT	1	32,667	32,667	7,840	40,507
IT Support Tech	1	11,667	11,667	2,800	14,467
Director of Facilities	1	30,000	30,000	7,200	37,200
Assistant facilities	1	25,000	25,000	6,000	31,000
Director of Special Education	1	22,667	22,667	5,440	28,107
Director of HR	1	18,333	18,333	4,400	22,733
Asst. Principal for Curriculum	1	60,000	60,000	14,400	74,400
Director of Development	1	23,333	23,333	5,600	28,933
Development Coordinator	1	11,667	11,667	2,800	14,467
Director of Student Services	1	30,000	30,000	7,200	37,200
Business Manager	1	18,333	18,333	4,400	22,733
Assistant Business Manager	1	17,000	17,000	4,080	21,080
Accounting Clerk	1	11,667	11,667	2,800	14,467
Buyer	1	9,667	9,667	2,320	11,987
Data Coordinator	1	12,667	12,667	3,040	15,707
Nurse	1	22,810	22,810	5,474	28,284
Security	1	14,500	14,500	3,480	17,980
Director of Work Force Development	1	20,000	20,000	4,800	24,800
Athletic Director	1	20,095	20,095	4,823	24,918
Counselor	1	33,114	33,114	7,947	41,061
Social worker	1	21,538	21,538	5,169	26,707
Admin support	5	15,580	77,900	18,696	96,596
Assistant Principal HS/MS	1	35,000	35,000	8,400	43,400
Principal HS/MS	1	45,000	45,000	10,800	55,800
Special Education teacher	5	22,754	113,769	27,305	141,074
Special Education para	2	13,500	27,000	6,480	33,480

Welding Instructor	1	51,250	51,250	12,300	63,550
Title 1 para	2	14,663	29,325	7,038	36,363
Foreign Language	1	18,900	18,900	4,536	23,436
Math HS	5	49,453	247,267	59,344	306,611
In house Sub	2	16,000	32,000	7,680	39,680
Choir	1	16,000	16,000	3,840	19,840
Business	1	35,000	35,000	8,400	43,400
Science HS	1	42,800	42,800	10,272	53,072
PE	2	16,000	32,000	7,680	39,680
History HS	3	26,336	79,007	18,962	97,968
PLTW	1	78,000	78,000	18,720	96,720
Social Studies HS	1	39,461	39,461	9,471	48,932
Band	1	16,824	16,824	4,038	20,862
Language Arts HS	3	34,790	104,370	25,049	129,419
Drama	1	19,310	19,310	4,634	23,944
Art	1	16,000	16,000	3,840	19,840
			-		-
<b>TOTAL</b>			1,676,907	402,458	2,079,365

# Career Academy South Bend Middle School

## Expected Charter School Staffing Needs -- Year 1

### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. These are calculated based on 24% of salary.

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	41,667	41,667	10,000	51,667
Assistant to Superintendent	1	12,333	12,333	2,960	15,293
Director of IT	1	32,667	32,667	7,840	40,507
IT Support Tech	1	11,667	11,667	2,800	14,467
Director of Facilities	1	30,000	30,000	7,200	37,200
Assistant facilities	1	25,000	25,000	6,000	31,000
Director of Special Education	1	22,667	22,667	5,440	28,107
Director of HR	1	18,333	18,333	4,400	22,733
Director of Development	1	23,333	23,333	5,600	28,933
Development Coordinator	1	11,667	11,667	2,800	14,467
Director of Student Services	1	30,000	30,000	7,200	37,200
Business Manager	1	18,333	18,333	4,400	22,733
Assistant Business Manager	1	17,000	17,000	4,080	21,080
Accounting Clerk	1	11,667	11,667	2,800	14,467
Buyer	1	9,667	9,667	2,320	11,987
Data Coordinator	1	12,667	12,667	3,040	15,707
Nurse @ HS Bldg	1	22,810	22,810	5,474	28,284
Nurse @ MS Bldg SASB	1	25,000	25,000	6,000	31,000
Security @ HS Bldg	1	14,500	14,500	3,480	17,980
Resource Officer @ MS Bldg SASB	1	2,500	2,500	600	3,100
Athletic Director	1	20,095	20,095	4,823	24,918
Director of Work Force Development	1	20,000	20,000	4,800	24,800
Counselor @ HS Bldg	1	33,114	33,114	7,947	41,061
Counselor @ MS Bldg SASB	1	25,000	25,000	6,000	31,000
Social worker @ HS Bldg	1	21,538	21,538	5,169	26,707
Social worker @ MS Bldg SASB	1	25,000	25,000	6,000	31,000
Admin support	5	15,580	77,900	18,696	96,596
Assistant Principal @ HS bldg	1	35,000	35,000	8,400	43,400
Principal @ HS bldg	1	45,000	45,000	10,800	55,800
Assistant Principal @ MS bldg SASB	1	39,000	39,000	9,360	48,360
Principal @ MS bldg SASB	1	42,500	42,500	10,200	52,700
Special Education teacher	5	22,754	113,769	27,305	141,074
Special Education para	2	13,500	27,000	6,480	33,480

Title 1 para	2	16,495	32,991	7,918	40,908
Foreign Language	1	18,900	18,900	4,536	23,436
In house Sub	2	16,000	32,000	7,680	39,680
Choir	1	16,000	16,000	3,840	19,840
Math MS	3	39,321	117,963	28,311	146,274
PE @ HS bldg	2	16,000	32,000	7,680	39,680
PE @ MS bldg SASB	2	16,000	32,000	7,680	39,680
Social Studies MS	2	36,614	73,229	17,575	90,803
Band @ HS bldg	1	16,824	16,824	4,038	20,862
Band @ MS Bldg SASB	1	21,500	21,500	5,160	26,660
Language Arts MS	3	34,012	102,036	24,489	126,525
Science MS	3	46,206	138,618	33,268	171,886
Drama	1	19,310	19,310	4,634	23,944
Art @ HS Bldg	1	16,000	16,000	3,840	19,840
Art @ MS Bldg SASB	1	16,000	16,000	3,840	19,840
Technology teacher @ MS Bldg SASB	1	17,500	17,500	4,200	21,700
			-		-
<b>TOTAL</b>			1,621,263	389,103	2,010,367

# Success Academy South Bend (Elementary)

## Expected Charter School Staffing Needs -- Year 1

### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. These are calculated based on 24% of salary.

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	41,667	41,667	10,000	51,667
Assistant to Superintendent	1	12,333	12,333	2,960	15,293
Director of IT	1	32,667	32,667	7,840	40,507
IT Support Tech	1	11,667	11,667	2,800	14,467
Assistant facilities	1	25,000	25,000	6,000	31,000
Director of Special Education	1	22,667	22,667	5,440	28,107
Director of HR	1	18,333	18,333	4,400	22,733
Director of Curriculum	1	20,000	20,000	4,800	24,800
Director of Development	1	23,333	23,333	5,600	28,933
Development Coordinator	1	11,667	11,667	2,800	14,467
Business Manager	1	18,333	18,333	4,400	22,733
Assistant Business Manager	1	17,000	17,000	4,080	21,080
Accounting Clerk	1	11,667	11,667	2,800	14,467
Buyer	1	9,667	9,667	2,320	11,987
Data Coordinator	1	12,667	12,667	3,040	15,707
Nurse - Elem/MS	1	25,000	25,000	6,000	31,000
Resource Officer - Elem/MS	1	2,500	2,500	600	3,100
Athletic Director	1	20,095	20,095	4,823	24,918
Counselor - Elem/MS	1	25,000	25,000	6,000	31,000
Social worker - Elem/MS	1	25,000	25,000	6,000	31,000
Admin support	2	31,000	62,000	14,880	76,880
Assistant Principal Elem/MS	1	39,000	39,000	9,360	48,360
Principal Elem/MS	1	42,500	42,500	10,200	52,700
Special Education teacher	5	37,000	185,000	44,400	229,400
Special Education para	1	28,000	28,000	6,720	34,720
Kindergarten	3	41,207	123,620	29,669	153,289
1st grade	3	36,200	108,600	26,064	134,664
2nd grade	3	41,667	125,000	30,000	155,000
3rd grade	3	52,602	157,806	37,873	195,679
4th grade	3	42,739	128,217	30,772	158,989
PE -boys/girls	2	16,000	32,000	7,680	39,680
Spanish	1	37,800	37,800	9,072	46,872
General Music	1	21,500	21,500	5,160	26,660

Art	1	16,000	16,000	3,840	19,840
Technology teacher	1	17,500	17,500	4,200	21,700
			-		-
<b>TOTAL</b>			1,510,805	362,593	1,873,398

## Career Academy South Bend Inc - All Schools

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1, 2016 - June 30, 2017		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 9,278,195	
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Full-Day Kindergarten	\$ -	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ 60,000	
Summer School	\$ 32,000	
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant	\$ -	NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant	\$ 650,000	
Public Law 101-476 (IDEA)	\$ -	
Title I	\$ 286,000	
Title II	\$ -	
Federal Lunch Program	\$ -	
Federal Breakfast Reimbursement	\$ -	
Other Revenue Federal sources - Spec Ed Part B	\$ 83,000	
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 80,560	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary	\$ 550,000	
<b>Total Revenue</b>	<b>\$ 11,434,055</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 6,423,269	Use staffing workbook
Substitute Teachers	\$ 33,000	
Professional Development	\$ 30,000	
Bonuses	\$ 420,000	
Other - Athletic officials/referees	\$ 5,971	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 6,912,240</b>	

<b>Instructional Supplies and Resources</b>		
Textbooks	\$	60,000
Library, periodicals, etc	\$	-
Technology	\$	-
Assessment materials	\$	9,306
Computers	\$	-
Software	\$	-
Other classroom supplies	\$	220,193
Field trips, other unclassified items	\$	9,427
Co-curricular & Athletics	\$	17,473
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	316,399
<b>Support Supplies and Resources</b>		
Administrative Computers	\$	-
Administrative Software	\$	-
Administration Dues, fees, misc expenses	\$	73,338
Office supplies	\$	56,208
Other - Nurse supplies	\$	7,047
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Support Supplies and Resources</b>	\$	136,593
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$	-
Charter Board Supplies & Equipment	\$	-
Charter Board Dues, fees, etc	\$	408
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Board Expenses</b>	\$	408
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$	-
Audit Services (compliant with SBOA requirements)	\$	9,000
Payroll Services	\$	6,695
Accounting Services	\$	2,001
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	10,983
Internet Services	\$	16,014
Telephone/Telecommunication Services	\$	44,193
Total Insurance Costs	\$	42,313
Travel	\$	22,023
Postage	\$	4,192
Special Education Services	\$	67,867



Student Information Services	\$	33,179	
Food service	\$	-	
Transportation	\$	9,324	
Nursing Services	\$	-	
Other - Athletic fees/dues	\$	12,587	
Other - Advertising	\$	80,001	
Other - Meals provided	\$	15,745	
Other - Rentals	\$	21,554	
<b>Total Professional Purchased or Contracted Services</b>	\$	397,671	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	988,000	
Furniture & Equipment	\$	-	
Gas/electric	\$	173,951	
Water/ Sewer	\$	14,255	
Grounds Keeping	\$	33,731	
Maintenance Services	\$	82,251	
Custodial	\$	315,085	
Waste disposal	\$	8,300	
Debt Service - GFF/Garotoni (Interest Only)	\$	90,671	
Depreciation Expense	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Facilities</b>	\$	1,706,244	
<b>Other</b>			
Contingency	\$	-	
Charter Administrative Fee	\$	278,346	Assume 3% of Basic Grant (Row 6)
			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$	-	
Common School Fund Loan Interest Costs	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Other</b>	\$	278,346	
<b>Total Expenditures</b>	\$	9,747,901	
<b>Carryover/Deficit</b>	\$	1,686,154	

Cumulative Carryover/(Deficit) \$ 2,477,361

## Career Academy South Bend High School

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1, 2016 - June 30, 2017		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,929,847	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 19,000	
Summer School	\$ 16,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant	\$ 200,000	
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 29,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary		
<b>Total Revenue</b>	<b>\$ 3,729,147</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,131,515	Use staffing workbook
Substitute Teachers	\$ 11,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 3,662	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		

<b>Total Personnel Expenses</b>	\$	2,296,177
<b>Instructional Supplies and Resources</b>		
Textbooks	\$	19,000
Library, periodicals, etc		
Technology		
Assessment materials	\$	3,633
Computers		
Software		
Other classroom supplies	\$	133,674
Field trips, other unclassified items	\$	2,802
Co-curricular & Athletics	\$	12,454
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	171,563
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,446
Office supplies	\$	18,736
Other - Nurse supplies	\$	2,480
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,662
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	142
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	142
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,298
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services		
Consultants	\$	8,040
Internet Services	\$	5,916
Telephone/Telecommunication Services	\$	15,444
Total Insurance Costs	\$	13,947
Travel	\$	15,704
Postage	\$	1,901

Special Education Services	\$	24,714	
Student Information Services	\$	22,079	
Food service			
Transportation	\$	5,017	
Nursing Services			
Other - Athletic fees/dues	\$	6,421	
Other - Advertising	\$	26,667	
Other - Meals provided	\$	7,097	
Other - Rentals	\$	10,096	
<b>Total Professional Purchased or Contracted Services</b>	\$	169,008	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	38,000	
Furniture & Equipment			
Gas/electric	\$	52,947	
Water/ Sewer	\$	4,200	
Grounds Keeping	\$	11,622	
Maintenance Services	\$	31,830	
Custodial	\$	84,717	
Waste disposal	\$	2,179	
Debt Service - GFF/Garotoni (Interest Only)	\$	67,353	
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	292,848	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	87,895	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	87,895	
<b>Total Expenditures</b>	\$	3,063,295	
<b>Carryover/Deficit</b>	\$	665,852	

Cumulative Carryover/(Deficit) \$ 1,569,047

## Career Academy South Bend Middle School

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1, 2016 - June 30, 2017		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,858,424	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 19,000	
Summer School	\$ 16,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant	\$ 200,000	
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 27,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church		
Other - Rental Income - Middle School		
Other - Rental Income - Elementary	\$ 550,000	
<b>Total Revenue</b>	<b>\$ 3,791,424</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,060,126	Use staffing workbook
Substitute Teachers	\$ 11,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 2,309	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		

<b>Total Personnel Expenses</b>	\$	2,223,435
<b>Instructional Supplies and Resources</b>		
Textbooks	\$	19,000
Library, periodicals, etc		
Technology		
Assessment materials	\$	3,633
Computers		
Software		
Other classroom supplies	\$	45,719
Field trips, other unclassified items	\$	2,625
Co-curricular & Athletics	\$	5,019
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	75,996
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,446
Office supplies	\$	18,736
Other - Nurse supplies	\$	2,323
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,505
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	133
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	133
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,153
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services		
Consultants	\$	2,943
Internet Services	\$	5,508
Telephone/Telecommunication Services	\$	14,469
Total Insurance Costs	\$	13,066
Travel	\$	4,279
Postage	\$	1,781

Special Education Services	\$	23,153	
Student Information Services	\$	9,100	
Food service			
Transportation	\$	4,307	
Nursing Services			
Other - Athletic fees/dues	\$	6,166	
Other - Advertising	\$	26,667	
Other - Meals provided	\$	6,648	
Other - Rentals	\$	9,458	
<b>Total Professional Purchased or Contracted Services</b>	\$	133,365	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	400,000	
Furniture & Equipment			
Gas/electric	\$	49,604	
Water/ Sewer	\$	3,935	
Grounds Keeping	\$	10,889	
Maintenance Services	\$	29,821	
Custodial	\$	79,368	
Waste disposal	\$	2,041	
Debt Service - GFF/Garatoni (Interest Only)	\$	23,318	
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	598,976	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	85,753	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	85,753	
<b>Total Expenditures</b>	\$	3,163,163	
<b>Carryover/Deficit</b>	\$	628,261	

Cumulative Carryover/(Deficit) \$ 512,750

## Success Academy South Bend - Elementary

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1, 2016 - June 30, 2017		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 3,489,924	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 22,000	
Summer School		
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant	\$ 250,000	
Public Law 101-476 (IDEA)		
Title I	\$ 108,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 27,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 16,560	
Other - Rental Income - Riverside Church		
Other - Rental Income - Middle School		
Other - Rental Income - Elementary		
<b>Total Revenue</b>	<b>\$ 3,913,484</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,231,628	Use staffing workbook
Substitute Teachers	\$ 11,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		



<b>Total Personnel Expenses</b>	\$	2,392,628
<b>Instructional Supplies and Resources</b>		
Textbooks	\$	22,000
Library, periodicals, etc		
Technology		
Assessment materials	\$	2,040
Computers		
Software		
Other classroom supplies	\$	40,800
Field trips, other unclassified items	\$	4,000
Co-curricular & Athletics		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	68,840
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,446
Office supplies	\$	18,736
Other - Nurse supplies	\$	2,244
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	45,426
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	133
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	133
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,000
Payroll Services	\$	2,244
Accounting Services	\$	667
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,590
Telephone/Telecommunication Services	\$	14,280
Total Insurance Costs	\$	15,300
Travel	\$	2,040
Postage	\$	510

Special Education Services	\$	20,000	
Student Services	\$	2,000	
Food service			
Transportation			
Nursing Services			
Other - Athletic fees/dues			
Other - Advertising	\$	26,667	
Other - Meals provided	\$	2,000	
Other - Rentals	\$	2,000	
<b>Total Professional Purchased or Contracted Services</b>	\$	95,298	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	550,000	
Furniture & Equipment			
Gas/electric	\$	71,400	
Water/ Sewer	\$	6,120	
Grounds Keeping	\$	11,220	
Maintenance Services	\$	20,600	
Custodial	\$	151,000	
Waste disposal	\$	4,080	
Debt Service - GFF/Garatoni (Interest Only)			
Depreciation Expense			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Facilities</b>	\$	814,420	
<b>Other</b>			
Contingency			
Charter Administrative Fee	\$	104,698	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs			
Other (please describe)			
Other (please describe)			
Other (please describe)			
<b>Total Other</b>	\$	104,698	
<b>Total Expenditures</b>	\$	3,521,443	
<b>Carryover/Deficit</b>	\$	392,041	

Cumulative Carryover/(Deficit) \$ 395,564

# Career Academy South Bend High School

## Expected Charter School Staffing Needs -- Year 2

Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.

### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. These are calculated based on 24% of salary.

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Asst. Principal for Curriculum	1	61,500	61,500	14,760	76,260
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse	1	23,380	23,380	5,611	28,992
Security	1	14,863	14,863	3,567	18,430
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor	1	33,942	33,942	8,146	42,087
Social worker	1	22,076	22,076	5,298	27,375
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal HS/MS	1	35,875	35,875	8,610	44,485
Principal HS/MS	1	46,125	46,125	11,070	57,195
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317

Welding Instructor	1	52,531	52,531	12,607	65,138
Title 1 para	2	15,029	30,058	7,214	37,272
Foreign Language	1	19,373	19,373	4,649	24,022
Math HS	5	50,690	253,449	60,828	314,277
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Business	1	35,875	35,875	8,610	44,485
Science HS	1	43,870	43,870	10,529	54,399
PE	2	16,400	32,800	7,872	40,672
History HS	3	26,994	80,982	19,436	100,417
PLTW	1	79,950	79,950	19,188	99,138
Social Studies HS	1	40,448	40,448	9,707	50,155
Band	1	17,245	17,245	4,139	21,383
Language Arts HS	3	35,660	106,979	25,675	132,654
Drama	1	19,929	19,929	4,783	24,712
Art	1	16,400	16,400	3,936	20,336
			-		-
<b>TOTAL</b>			1,718,964	412,551	2,131,515

# Career Academy South Bend Middle School

## Expected Charter School Staffing Needs -- Year 2

### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. These  
are calculated based on 24% of salary.

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse @ HS Bldg	1	23,380	23,380	5,611	28,992
Nurse @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Security @ HS Bldg	1	14,863	14,863	3,567	18,430
Resource Officer @ MS Bldg SASB	1	2,563	2,563	615	3,178
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor @ HS Bldg	1	33,942	33,942	8,146	42,087
Counselor @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Social worker @ HS Bldg	1	22,076	22,076	5,298	27,375
Social worker @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal @ HS bldg	1	35,875	35,875	8,610	44,485
Principal @ HS bldg	1	46,125	46,125	11,070	57,195
Assistant Principal @ MS bldg SASB	1	39,975	39,975	9,594	49,569
Principal @ MS bldg SASB	1	43,563	43,563	10,455	54,018
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317

Title 1 para	2	16,908	33,815	8,116	41,931
Foreign Language	1	19,373	19,373	4,649	24,022
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Math MS	3	40,304	120,912	29,019	149,931
PE @ HS bldg	2	16,400	32,800	7,872	40,672
PE @ MS bldg SASB	2	16,400	32,800	7,872	40,672
Social Studies MS	2	37,529	75,059	18,014	93,073
Band @ HS bldg	1	17,245	17,245	4,139	21,383
Band @ MS Bldg SASB	1	22,038	22,038	5,289	27,327
Language Arts MS	3	34,862	104,587	25,101	129,688
Science MS	3	47,361	142,083	34,100	176,183
Drama	1	19,793	19,793	4,750	24,543
Art @ HS Bldg	1	16,400	16,400	3,936	20,336
Art @ MS Bldg SASB	1	16,000	16,000	3,840	19,840
Technology Teacher @ MS Bldg SASB	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,661,392	398,734	2,060,126

## Success Academy South Bend (Elementary)

### Expected Charter School Staffing Needs -- Year 2

#### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. These  
are calculated based on 24% of salary.

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse - Elem/MS	1	25,625	25,625	6,150	31,775
Resource Officer - Elem/MS	1	2,563	2,563	615	3,178
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor - Elem/MS	1	25,625	25,625	6,150	31,775
Social worker - Elem/MS	1	25,625	25,625	6,150	31,775
Admin support	2	31,775	63,550	15,252	78,802
Assistant Principal Elem/MS	1	39,975	39,975	9,594	49,569
Principal Elem/MS	1	43,563	43,563	10,455	54,018
Special Education teacher	5	37,925	189,625	45,510	235,135
Special Education para	1	28,700	28,700	6,888	35,588
Kindergarten	5	39,692	198,461	47,631	246,091
1st grade	5	40,713	203,565	48,856	252,421
2nd grade	4	41,000	164,000	39,360	203,360
3rd grade	4	49,407	197,626	47,430	245,056
4th grade	4	41,824	167,297	40,151	207,449
PE -boys/girls	2	16,400	32,800	7,872	40,672
Spanish	1	38,745	38,745	9,299	48,044
General Music	1	22,038	22,038	5,289	27,327
Art	1	16,400	16,400	3,936	20,336

Technology Teacher	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,799,700	431,928	2,231,628



## Career Academy South Bend Inc - All Schools

Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1, 2017 - June 30, 2018		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 9,278,195	
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Full-Day Kindergarten	\$ -	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ 63,000	
Summer School	\$ 34,000	
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ -	
Title I	\$ 286,000	
Title II	\$ -	
Federal Lunch Program	\$ -	
Federal Breakfast Reimbursement	\$ -	
Other Revenue Federal sources - Spec Ed Part B	\$ 86,000	
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 81,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary	\$ 550,000	
<b>Total Revenue</b>	<b>\$ 10,792,495</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 6,423,269	Use staffing workbook
Substitute Teachers	\$ 36,000	
Professional Development	\$ 30,000	
Bonuses	\$ 420,000	
Other - Athletic officials/referees	\$ 6,090	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 6,915,359</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 63,000	
Library, periodicals, etc	\$ -	

Technology	\$	-
Assessment materials	\$	9,493
Computers	\$	-
Software	\$	-
Other classroom supplies	\$	225,933
Field trips, other unclassified items	\$	10,096
Co-curricular & Athletics	\$	17,822
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	326,344
<b>Support Supplies and Resources</b>		
Administrative Computers	\$	-
Administrative Software	\$	-
Administration Dues, fees, misc expenses	\$	74,805
Office supplies	\$	56,959
Other - Nurse supplies	\$	7,188
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Support Supplies and Resources</b>	\$	138,952
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$	-
Charter Board Supplies & Equipment	\$	-
Charter Board Dues, fees, etc	\$	417
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Board Expenses</b>	\$	417
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$	-
Audit Services (compliant with SBOA requirements)	\$	9,999
Payroll Services	\$	6,829
Accounting Services	\$	2,499
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	11,203
Internet Services	\$	16,334
Telephone/Telecommunication Services	\$	45,077
Total Insurance Costs	\$	43,159
Travel	\$	22,464
Postage	\$	4,276
Special Education Services	\$	76,000
Student Information Services	\$	34,803
Food service	\$	-
Transportation	\$	9,510
Nursing Services	\$	-

Other - Athletic fees/dues	\$	12,838	
Other - Advertising	\$	45,000	
Other - Meals provided	\$	16,520	
Other - Rentals	\$	22,445	
<b>Total Professional Purchased or Contracted Services</b>	\$	378,956	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	1,007,000	
Furniture & Equipment	\$	-	
Gas/electric	\$	177,430	
Water/ Sewer	\$	14,540	
Grounds Keeping	\$	34,405	
Maintenance Services	\$	83,896	
Custodial	\$	319,366	
Waste disposal	\$	8,467	
Debt Service - GFF/Garotoni (Interest Only)	\$	92,484	
Depreciation Expense	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Facilities</b>	\$	1,737,588	
<b>Other</b>			
Contingency	\$	-	
Charter Administrative Fee	\$	278,346	Assume 3% of Basic Grant (Row 6)
			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$	-	
Common School Fund Loan Interest Costs	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Other</b>	\$	278,346	
<b>Total Expenditures</b>	\$	9,775,962	
<b>Carryover/Deficit</b>	\$	1,016,533	

Cumulative Carryover/(Deficit) \$ 3,328,534

## Career Academy South Bend High School

Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1, 2017 - June 30, 2018		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,929,847	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 20,000	
Summer School	\$ 17,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 30,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,532,147</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,131,515	Use staffing workbook
Substitute Teachers	\$ 12,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 3,735	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,297,250</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 20,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,706
Computers		
Software		
Other classroom supplies	\$	137,684
Field trips, other unclassified items	\$	2,858
Co-curricular & Athletics	\$	12,703
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	176,951
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,935
Office supplies	\$	18,737
Other - Nurse supplies	\$	2,530
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	46,202
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	145
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	145
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,344
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	8,201
Internet Services	\$	6,034
Telephone/Telecommunication Services	\$	15,753
Total Insurance Costs	\$	14,226
Travel	\$	16,018
Postage	\$	1,939
Special Education Services	\$	26,000
Student Information Services	\$	22,521
Food service		
Transportation	\$	5,117

Nursing Services		
Other - Athletic fees/dues	\$ 6,549	
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 7,239	
Other - Rentals	\$ 10,298	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 161,405</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 37,000	
Furniture & Equipment		
Gas/electric	\$ 54,006	
Water/ Sewer	\$ 4,284	
Grounds Keeping	\$ 11,854	
Maintenance Services	\$ 32,467	
Custodial	\$ 86,411	
Waste disposal	\$ 2,223	
Debt Service - GFF/Garatoni (Interest Only)	\$ 68,700	
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 296,945</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 87,895	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 87,895</b>	
<b>Total Expenditures</b>	<b>\$ 3,066,793</b>	
<b>Carryover/Deficit</b>	<b>\$ 465,354</b>	

Cumulative Carryover/(Deficit) \$ 2,009,340

## Career Academy South Bend Middle School

Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1, 2017 - June 30, 2018		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,858,424	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 20,000	
Summer School	\$ 17,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 28,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church		
Other - Rental Income - Elementary	\$ 550,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,594,424</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,060,126	Use staffing workbook
Substitute Teachers	\$ 12,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 2,355	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,224,481</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 20,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,706
Computers		
Software		
Other classroom supplies	\$	46,633
Field trips, other unclassified items	\$	2,678
Co-curricular & Athletics	\$	5,119
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	78,136
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,935
Office supplies	\$	19,111
Other - Nurse supplies	\$	2,369
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	46,415
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	136
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	136
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,196
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	3,002
Internet Services	\$	5,618
Telephone/Telecommunication Services	\$	14,758
Total Insurance Costs	\$	13,327
Travel	\$	4,365
Postage	\$	1,817
Special Education Services	\$	25,000
Student Information Services	\$	9,282
Food service		
Transportation	\$	4,393



Nursing Services		
Other - Athletic fees/dues	\$ 6,289	
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 6,781	
Other - Rentals	\$ 9,647	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 125,641</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 420,000	
Furniture & Equipment		
Gas/electric	\$ 50,596	
Water/ Sewer	\$ 4,014	
Grounds Keeping	\$ 11,107	
Maintenance Services	\$ 30,417	
Custodial	\$ 80,955	
Waste disposal	\$ 2,082	
Debt Service - GFF/Garatoni (Interest Only)	\$ 23,784	
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 622,955</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 85,753	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 85,753</b>	
<b>Total Expenditures</b>	<b>\$ 3,183,517</b>	
<b>Carryover/Deficit</b>	<b>\$ 410,907</b>	

Cumulative Carryover/(Deficit) \$ 884,535

## Success Academy South Bend - Elementary

Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1, 2017 - June 30, 2018		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 3,489,924	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 23,000	
Summer School		
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 108,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 28,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 17,000	
Other - Rental Income - Riverside Church		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,665,924</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,231,628	Use staffing workbook
Substitute Teachers	\$ 12,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,393,628</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 23,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	2,081
Computers		
Software		
Other classroom supplies	\$	41,616
Field trips, other unclassified items	\$	4,560
Co-curricular & Athletics		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	71,257
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	24,935
Office supplies	\$	19,111
Other - Nurse supplies	\$	2,289
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	46,335
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	136
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	136
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,289
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,682
Telephone/Telecommunication Services	\$	14,566
Total Insurance Costs	\$	15,606
Travel	\$	2,081
Postage	\$	520
Special Education Services	\$	25,000
Student Information Services	\$	3,000
Food service		
Transportation		

Nursing Services		
Other - Athletic fees/dues		
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 2,500	
Other - Rentals	\$ 2,500	
<b>Total Professional Purchased or Contracted Services</b>	\$ 91,910	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 550,000	
Furniture & Equipment		
Gas/electric	\$ 72,828	
Water/ Sewer	\$ 6,242	
Grounds Keeping	\$ 11,444	
Maintenance Services	\$ 21,012	
Custodial	\$ 152,000	
Waste disposal	\$ 4,162	
Debt Service - GFF/Garatoni (Interest Only)		
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	\$ 817,688	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 104,698	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 104,698	
<b>Total Expenditures</b>	\$ 3,525,652	
<b>Carryover/Deficit</b>	\$ 140,272	

Cumulative Carryover/(Deficit) \$ 434,659

## Career Academy South Bend High School

### Expected Charter School Staffing Needs -- Year 3

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. are calculated based on 24% of salary.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Asst. Principal for Curriculum	1	61,500	61,500	14,760	76,260
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse	1	23,380	23,380	5,611	28,992
Security	1	14,863	14,863	3,567	18,430
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor	1	33,942	33,942	8,146	42,087
Social worker	1	22,076	22,076	5,298	27,375
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal HS/MS	1	35,875	35,875	8,610	44,485

Principal HS/MS	1	46,125	46,125	11,070	57,195
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Welding Instructor	1	52,531	52,531	12,607	65,138
Title I para	2	15,029	30,058	7,214	37,272
Foreign Language	1	19,373	19,373	4,649	24,022
Math HS	5	50,690	253,449	60,828	314,277
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Business	1	35,875	35,875	8,610	44,485
Science HS	1	43,870	43,870	10,529	54,399
PE	2	16,400	32,800	7,872	40,672
History HS	3	26,994	80,982	19,436	100,417
PLTW	1	79,950	79,950	19,188	99,138
Social Studies HS	1	40,448	40,448	9,707	50,155
Band	1	17,245	17,245	4,139	21,383
Language Arts HS	3	35,660	106,979	25,675	132,654
Drama	1	19,929	19,929	4,783	24,712
Art	1	16,400	16,400	3,936	20,336
			-		-
			-		-
<b>TOTAL</b>			1,718,964	412,551	2,131,515

## Career Academy South Bend Middle School

### Expected Charter School Staffing Needs -- Year 3

#### Benefits Assumptions - Please describe how you calculated your benefits and what is included below

Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.  
are calculated based on 24% of salary.

These

Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse @ HS Bldg	1	23,380	23,380	5,611	28,992
Nurse @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Security @ HS Bldg	1	14,863	14,863	3,567	18,430
Resource Officer @ MS Bldg SASB	1	2,563	2,563	615	3,178
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor @ HS Bldg	1	33,942	33,942	8,146	42,087
Counselor @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Social worker @ HS Bldg	1	22,076	22,076	5,298	27,375
Social worker @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal @ HS bldg	1	35,875	35,875	8,610	44,485
Principal @ HS bldg	1	46,125	46,125	11,070	57,195

Assistant Principal @ MS bldg SASB	1	39,975	39,975	9,594	49,569
Principal @ MS bldg SASB	1	43,563	43,563	10,455	54,018
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Title 1 para	2	16,908	33,815	8,116	41,931
Foreign Language	1	19,373	19,373	4,649	24,022
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Math MS	3	40,304	120,912	29,019	149,931
PE @ HS bldg	2	16,400	32,800	7,872	40,672
PE @ MS bldg SASB	2	16,400	32,800	7,872	40,672
Social Studies MS	2	37,529	75,059	18,014	93,073
Band @ HS bldg	1	17,245	17,245	4,139	21,383
Band @ MS Bldg SASB	1	22,038	22,038	5,289	27,327
Language Arts MS	3	34,862	104,587	25,101	129,688
Science MS	3	47,361	142,083	34,100	176,183
Drama	1	19,793	19,793	4,750	24,543
Art @ HS Bldg	1	16,400	16,400	3,936	20,336
Art @ MS Bldg SASB	1	16,000	16,000	3,840	19,840
Technology Teacher @ MS Bldg SASB	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,661,392	398,734	2,060,126



## Success Academy South Bend (Elementary)

### Expected Charter School Staffing Needs -- Year 3

Benefits Assumptions - Please describe how you calculated your benefits and what is included below					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. are calculated based on 24% of salary.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse - Elem/MS	1	25,625	25,625	6,150	31,775
Resource Officer - Elem/MS	1	2,563	2,563	615	3,178
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor - Elem/MS	1	25,625	25,625	6,150	31,775
Social worker - Elem/MS	1	25,625	25,625	6,150	31,775
Admin support	2	31,775	63,550	15,252	78,802
Assistant Principal Elem/MS	1	39,975	39,975	9,594	49,569
Principal Elem/MS	1	43,563	43,563	10,455	54,018
Special Education teacher	5	37,925	189,625	45,510	235,135
Special Education para	1	28,700	28,700	6,888	35,588
Kindergarten	5	39,692	198,461	47,631	246,091
1st grade	5	40,713	203,565	48,856	252,421
2nd grade	4	41,000	164,000	39,360	203,360
3rd grade	4	49,407	197,626	47,430	245,056

4th grade	4	41,824	167,297	40,151	207,449
PE -boys/girls	2	16,400	32,800	7,872	40,672
Spanish	1	38,745	38,745	9,299	48,044
General Music	1	22,038	22,038	5,289	27,327
Art	1	16,400	16,400	3,936	20,336
Technology Teacher	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,799,700	431,928	2,231,628

## Career Academy South Bend Inc - All Schools

Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1, 2018 - June 30, 2019		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 9,278,195	
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Full-Day Kindergarten	\$ -	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ 66,000	
Summer School	\$ 36,000	
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ -	
Title I	\$ 286,000	
Title II	\$ -	
Federal Lunch Program	\$ -	
Federal Breakfast Reimbursement	\$ -	
Other Revenue Federal sources - Spec Ed Part B	\$ 89,000	
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 81,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary	\$ 550,000	
<b>Total Revenue</b>	<b>\$ 10,800,495</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 6,423,269	Use staffing workbook
Substitute Teachers	\$ 39,000	
Professional Development	\$ 30,000	
Bonuses	\$ 420,000	
Other - Athletic officials/referees	\$ 6,212	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 6,918,481</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 66,000	
Library, periodicals, etc	\$ -	

Technology	\$	-
Assessment materials	\$	9,683
Computers	\$	-
Software	\$	-
Other classroom supplies	\$	229,014
Field trips, other unclassified items	\$	10,298
Co-curricular & Athletics	\$	18,206
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	333,201
<b>Support Supplies and Resources</b>		
Administrative Computers	\$	-
Administrative Software	\$	-
Administration Dues, fees, misc expenses	\$	76,302
Office supplies	\$	58,098
Other - Nurse supplies	\$	7,332
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Support Supplies and Resources</b>	\$	141,732
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$	-
Charter Board Supplies & Equipment	\$	-
Charter Board Dues, fees, etc	\$	426
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Board Expenses</b>	\$	426
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	9,999
Payroll Services	\$	6,966
Accounting Services	\$	2,499
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	11,427
Internet Services	\$	16,661
Telephone/Telecommunication Services	\$	45,978
Total Insurance Costs	\$	44,023
Travel	\$	22,913
Postage	\$	4,361
Special Education Services	\$	76,500
Student Information Services	\$	34,968
Food service	\$	-
Transportation	\$	9,700
Nursing Services	\$	-

Other - Athletic fees/dues	\$	13,095	
Other - Advertising	\$	45,000	
Other - Meals provided	\$	16,801	
Other - Rentals	\$	22,844	
<b>Total Professional Purchased or Contracted Services</b>	\$	383,735	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	1,006,000	
Furniture & Equipment	\$	-	
Gas/electric	\$	180,979	
Water/ Sewer	\$	14,831	
Grounds Keeping	\$	35,094	
Maintenance Services	\$	85,573	
Custodial	\$	323,714	
Waste disposal	\$	8,636	
Debt Service - GFF/Garotoni (Interest Only)	\$	92,484	
Depreciation Expense	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Facilities</b>	\$	1,747,311	
<b>Other</b>			
Contingency	\$	-	
Charter Administrative Fee	\$	278,346	Assume 3% of Basic Grant (Row 6)
			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$	-	
Common School Fund Loan Interest Costs	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Other</b>	\$	278,346	
<b>Total Expenditures</b>	\$	9,803,232	
<b>Carryover/Deficit</b>	\$	997,263	

Cumulative Carryover/(Deficit) \$ 4,160,437

## Career Academy South Bend High School

Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1, 2018 - June 30, 2019		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,929,847	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 21,000	
Summer School	\$ 18,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 31,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,535,147</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,131,515	Use staffing workbook
Substitute Teachers	\$ 13,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 3,810	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,298,325</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 21,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,780
Computers		
Software		
Other classroom supplies	\$	139,000
Field trips, other unclassified items	\$	2,915
Co-curricular & Athletics	\$	12,985
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	179,680
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,434
Office supplies	\$	19,112
Other - Nurse supplies	\$	2,581
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	47,127
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	148
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	148
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,391
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	8,365
Internet Services	\$	6,155
Telephone/Telecommunication Services	\$	16,068
Total Insurance Costs	\$	14,511
Travel	\$	16,338
Postage	\$	1,978
Special Education Services	\$	26,000
Student Information Services	\$	22,500
Food service		
Transportation	\$	5,219

Nursing Services		
Other - Athletic fees/dues	\$ 6,680	
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 7,384	
Other - Rentals	\$ 10,504	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 163,259</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 36,000	
Furniture & Equipment		
Gas/electric	\$ 55,086	
Water/ Sewer	\$ 4,370	
Grounds Keeping	\$ 12,092	
Maintenance Services	\$ 33,116	
Custodial	\$ 88,140	
Waste disposal	\$ 2,267	
Debt Service - GFF/Garatoni (Interest Only)	\$ 68,700	
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 299,771</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 87,895	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 87,895</b>	
<b>Total Expenditures</b>	<b>\$ 3,076,205</b>	
<b>Carryover/Deficit</b>	<b>\$ 458,942</b>	

Cumulative Carryover/(Deficit) \$ 2,443,221



## Career Academy South Bend Middle School

Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1, 2018 - June 30, 2019		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,858,424	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 21,000	
Summer School	\$ 18,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 29,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church		
Other - Rental Income - Elementary	\$ 550,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,597,424</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,060,126	Use staffing workbook
Substitute Teachers	\$ 13,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 2,402	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,225,528</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 21,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,780
Computers		
Software		
Other classroom supplies	\$	47,566
Field trips, other unclassified items	\$	2,732
Co-curricular & Athletics	\$	5,221
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	80,299
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,434
Office supplies	\$	19,493
Other - Nurse supplies	\$	2,416
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	47,343
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	139
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	139
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,240
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	3,062
Internet Services	\$	5,730
Telephone/Telecommunication Services	\$	15,053
Total Insurance Costs	\$	13,594
Travel	\$	4,452
Postage	\$	1,853
Special Education Services	\$	25,500
Student Information Services	\$	9,468
Food service		
Transportation	\$	4,481

Nursing Services		
Other - Athletic fees/dues	\$ 6,415	
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 6,917	
Other - Rentals	\$ 9,840	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 127,771</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 420,000	
Furniture & Equipment		
Gas/electric	\$ 51,608	
Water/ Sewer	\$ 4,094	
Grounds Keeping	\$ 11,329	
Maintenance Services	\$ 31,025	
Custodial	\$ 82,574	
Waste disposal	\$ 2,124	
Debt Service - GFF/Garatoni (Interest Only)	\$ 23,784	
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 626,538</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 85,753	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 85,753</b>	
<b>Total Expenditures</b>	<b>\$ 3,193,371</b>	
<b>Carryover/Deficit</b>	<b>\$ 404,053</b>	

Cumulative Carryover/(Deficit) \$ 1,249,466

## Success Academy South Bend - Elementary

Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1, 2018 - June 30, 2019		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 3,489,924	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 24,000	
Summer School		
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 108,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 29,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 17,000	
Other - Rental Income - Riverside Church		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,667,924</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,231,628	Use staffing workbook
Substitute Teachers	\$ 13,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,394,628</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 24,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	2,123
Computers		
Software		
Other classroom supplies	\$	42,448
Field trips, other unclassified items	\$	4,651
Co-curricular & Athletics		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	73,222
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,434
Office supplies	\$	19,493
Other - Nurse supplies	\$	2,335
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	47,262
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	139
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	139
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,335
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,776
Telephone/Telecommunication Services	\$	14,857
Total Insurance Costs	\$	15,918
Travel	\$	2,123
Postage	\$	530
Special Education Services	\$	25,000
Student Information Services	\$	3,000
Food service		
Transportation		

Nursing Services		
Other - Athletic fees/dues		
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 2,500	
Other - Rentals	\$ 2,500	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 92,705</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 550,000	
Furniture & Equipment		
Gas/electric	\$ 74,285	
Water/ Sewer	\$ 6,367	
Grounds Keeping	\$ 11,673	
Maintenance Services	\$ 21,432	
Custodial	\$ 153,000	
Waste disposal	\$ 4,245	
Debt Service - GFF/Garatoni (Interest Only)		
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 821,002</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 104,698	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 104,698</b>	
<b>Total Expenditures</b>	<b>\$ 3,533,656</b>	
<b>Carryover/Deficit</b>	<b>\$ 134,268</b>	

Cumulative Carryover/(Deficit) \$ 467,750

## Career Academy South Bend High School

### Expected Charter School Staffing Needs -- Year 4

**Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.**

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
are calculated based on 24% of salary.					
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Surperintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Asst. Principal for Curriculum	1	61,500	61,500	14,760	76,260
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse	1	23,380	23,380	5,611	28,992
Security	1	14,863	14,863	3,567	18,430
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor	1	33,942	33,942	8,146	42,087
Social worker	1	22,076	22,076	5,298	27,375
Admin support	5	15,970	79,848	19,163	99,011

Assistant Principal HS/MS	1	35,875	35,875	8,610	44,485
Principal HS/MS	1	46,125	46,125	11,070	57,195
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Welding Instructor	1	52,531	52,531	12,607	65,138
Title I para	2	15,029	30,058	7,214	37,272
Foreign Language	1	19,373	19,373	4,649	24,022
Math HS	5	50,690	253,449	60,828	314,277
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Business	1	35,875	35,875	8,610	44,485
Science HS	1	43,870	43,870	10,529	54,399
PE	2	16,400	32,800	7,872	40,672
History HS	3	26,994	80,982	19,436	100,417
PLTW	1	79,950	79,950	19,188	99,138
Social Studies HS	1	40,448	40,448	9,707	50,155
Band	1	17,245	17,245	4,139	21,383
Language Arts HS	3	35,660	106,979	25,675	132,654
Drama	1	19,929	19,929	4,783	24,712
Art	1	16,400	16,400	3,936	20,336
			-		-
<b>TOTAL</b>			1,718,964	412,551	2,131,515



## Career Academy South Bend Middle School

### Expected Charter School Staffing Needs -- Year 4

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse @ HS Bldg	1	23,380	23,380	5,611	28,992
Nurse @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Security @ HS Bldg	1	14,863	14,863	3,567	18,430
Resource Officer @ MS Bldg SASB	1	2,563	2,563	615	3,178
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor @ HS Bldg	1	33,942	33,942	8,146	42,087
Counselor @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Social worker @ HS Bldg	1	22,076	22,076	5,298	27,375
Social worker @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal @ HS bldg	1	35,875	35,875	8,610	44,485
Principal @ HS bldg	1	46,125	46,125	11,070	57,195
Assistant Principal @ MS bldg SASB	1	39,975	39,975	9,594	49,569
Principal @ MS bldg SASB	1	43,563	43,563	10,455	54,018

Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Title 1 para	2	16,908	33,815	8,116	41,931
Foreign Language	1	19,373	19,373	4,649	24,022
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Math MS	3	40,304	120,912	29,019	149,931
PE @ HS bldg	2	16,400	32,800	7,872	40,672
PE @ MS bldg SASB	2	16,400	32,800	7,872	40,672
Social Studies MS	2	37,529	75,059	18,014	93,073
Band @ HS bldg	1	17,245	17,245	4,139	21,383
Band @ MS Bldg SASB	1	22,038	22,038	5,289	27,327
Language Arts MS	3	34,862	104,587	25,101	129,688
Science MS	3	47,361	142,083	34,100	176,183
Drama	1	19,793	19,793	4,750	24,543
Art @ HS Bldg	1	16,400	16,400	3,936	20,336
Art @ MS Bldg SASB	1	16,000	16,000	3,840	19,840
Technology Teacher @ MS Bldg SASB	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,661,392	398,734	2,060,126

## Success Academy South Bend (Elementary)

### Expected Charter School Staffing Needs -- Year 4

Benefits Assumptions - Please describe how you calculated your benefits and what is included below					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Surperintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse - Elem/MS	1	25,625	25,625	6,150	31,775
Resource Officer - Elem/MS	1	2,563	2,563	615	3,178
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor - Elem/MS	1	25,625	25,625	6,150	31,775
Social worker - Elem/MS	1	25,625	25,625	6,150	31,775
Admin support	2	31,775	63,550	15,252	78,802
Assistant Principal Elem/MS	1	39,975	39,975	9,594	49,569
Principal Elem/MS	1	43,563	43,563	10,455	54,018
Special Education teacher	5	37,925	189,625	45,510	235,135
Special Education para	1	28,700	28,700	6,888	35,588
Kindergarten	5	39,692	198,461	47,631	246,091
1st grade	5	40,713	203,565	48,856	252,421
2nd grade	4	41,000	164,000	39,360	203,360
3rd grade	4	49,407	197,626	47,430	245,056
4th grade	4	41,824	167,297	40,151	207,449
PE -boys/girls	2	16,400	32,800	7,872	40,672
Spanish	1	38,745	38,745	9,299	48,044

General Music	1	22,038	22,038	5,289	27,327
Art	1	16,400	16,400	3,936	20,336
Technology Teacher	1	17,938	17,938	4,305	22,243
			-		-
			-		-
<b>TOTAL</b>			1,799,700	431,928	2,231,628

## Career Academy South Bend Inc - All Schools

Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1, 2019 - June 30, 2020		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 9,278,195	
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Full-Day Kindergarten	\$ -	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ 69,000	
Summer School	\$ 38,000	
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ -	
Title I	\$ 286,000	
Title II	\$ -	
Federal Lunch Program	\$ -	
Federal Breakfast Reimbursement	\$ -	
Other Revenue Federal sources - Spec Ed Part B	\$ 92,000	
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 81,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other - Rental Income - Elementary	\$ 550,000	
<b>Total Revenue</b>	<b>\$ 10,808,495</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 6,423,269	Use staffing workbook
Substitute Teachers	\$ 42,000	
Professional Development	\$ 30,000	
Bonuses	\$ 420,000	
Other - Athletic officials/referees	\$ 6,336	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 6,921,605</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 69,000	
Library, periodicals, etc	\$ -	

Technology	\$	-
Assessment materials	\$	9,877
Computers	\$	-
Software	\$	-
Other classroom supplies	\$	232,814
Field trips, other unclassified items	\$	10,504
Co-curricular & Athletics	\$	18,570
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	340,765
<b>Support Supplies and Resources</b>		
Administrative Computers	\$	-
Administrative Software	\$	-
Administration Dues, fees, misc expenses	\$	77,829
Office supplies	\$	59,260
Other - Nurse supplies	\$	7,479
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Support Supplies and Resources</b>	\$	144,568
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$	-
Charter Board Supplies & Equipment	\$	-
Charter Board Dues, fees, etc	\$	435
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
Other (please describe)	\$	-
<b>Total Board Expenses</b>	\$	435
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$	-
Audit Services (compliant with SBOA requirements)	\$	9,999
Payroll Services	\$	7,106
Accounting Services	\$	2,499
Printing/Newsletter/Annual Report Services	\$	-
Consultants	\$	11,655
Internet Services	\$	16,995
Telephone/Telecommunication Services	\$	46,897
Total Insurance Costs	\$	44,903
Travel	\$	23,371
Postage	\$	4,449
Special Education Services	\$	77,010
Student Information Services	\$	35,157
Food service	\$	-
Transportation	\$	9,894
Nursing Services	\$	-

Other - Athletic fees/dues	\$	13,357	
Other - Advertising	\$	45,000	
Other - Meals provided	\$	17,087	
Other - Rentals	\$	23,251	
<b>Total Professional Purchased or Contracted Services</b>	\$	388,630	
<b>Facilities</b>			
Rent, mortgage, or other facility cost	\$	1,005,000	
Furniture & Equipment	\$	-	
Gas/electric	\$	184,599	
Water/ Sewer	\$	15,127	
Grounds Keeping	\$	35,795	
Maintenance Services	\$	87,285	
Custodial	\$	328,127	
Waste disposal	\$	8,766	
Debt Service - GFF/Garotoni (Interest Only)	\$	92,484	
Depreciation Expense	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Facilities</b>	\$	1,757,183	
<b>Other</b>			
Contingency	\$	-	
Charter Administrative Fee	\$	278,346	Assume 3% of Basic Grant (Row 6)
			Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$	-	
Common School Fund Loan Interest Costs	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
Other (please describe)	\$	-	
<b>Total Other</b>	\$	278,346	
<b>Total Expenditures</b>	\$	9,831,532	
<b>Carryover/Deficit</b>	\$	976,963	

Cumulative Carryover/(Deficit) \$ 4,972,040

## Career Academy South Bend High School

Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1, 2019 - June 30, 2020		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,929,847	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 22,000	
Summer School	\$ 19,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 32,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church	\$ 14,300	
Other - Rental Income - Middle School	\$ 400,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,538,147</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,131,515	Use staffing workbook
Substitute Teachers	\$ 14,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 3,886	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,299,401</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 22,000	



Library, periodicals, etc		
Technology		
Assessment materials	\$	3,856
Computers		
Software		
Other classroom supplies	\$	141,000
Field trips, other unclassified items	\$	2,973
Co-curricular & Athletics	\$	13,245
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	183,074
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,943
Office supplies	\$	19,494
Other - Nurse supplies	\$	2,633
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	48,070
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	151
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	151
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,439
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	8,532
Internet Services	\$	6,278
Telephone/Telecommunication Services	\$	16,389
Total Insurance Costs	\$	14,801
Travel	\$	16,665
Postage	\$	2,018
Special Education Services	\$	26,000
Student Information Services	\$	22,500
Food service		
Transportation	\$	5,323

Nursing Services		
Other - Athletic fees/dues	\$	6,814
Other - Advertising	\$	15,000
Other - Meals provided	\$	7,532
Other - Rentals	\$	10,714
<b>Total Professional Purchased or Contracted Services</b>	\$	165,171
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$	35,000
Furniture & Equipment		
Gas/electric	\$	56,188
Water/ Sewer	\$	4,457
Grounds Keeping	\$	12,333
Maintenance Services	\$	33,778
Custodial	\$	89,902
Waste disposal	\$	2,312
Debt Service - GFF/Garatoni (Interest Only)	\$	68,700
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	\$	302,670
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$	87,895
		Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$	87,895
<b>Total Expenditures</b>	\$	3,086,432
<b>Carryover/Deficit</b>	\$	451,715

Cumulative Carryover/(Deficit) \$ 2,869,875

## Career Academy South Bend Middle School

Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1, 2019 - June 30, 2020		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,858,424	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 22,000	
Summer School	\$ 19,000	
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 89,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 30,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 32,000	
Other - Rental Income - Riverside Church		
Other - Rental Income - Elementary	\$ 550,000	
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,600,424</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,060,126	Use staffing workbook
Substitute Teachers	\$ 14,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees	\$ 2,450	
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,226,576</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 22,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	3,856
Computers		
Software		
Other classroom supplies	\$	48,517
Field trips, other unclassified items	\$	2,787
Co-curricular & Athletics	\$	5,325
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	82,485
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,943
Office supplies	\$	19,883
Other - Nurse supplies	\$	2,464
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	48,290
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	142
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	142
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,285
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants	\$	3,123
Internet Services	\$	5,845
Telephone/Telecommunication Services	\$	15,354
Total Insurance Costs	\$	13,866
Travel	\$	4,541
Postage	\$	1,890
Special Education Services	\$	26,010
Student Information Services	\$	9,657
Food service		
Transportation	\$	4,571

Nursing Services		
Other - Athletic fees/dues	\$ 6,543	
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 7,055	
Other - Rentals	\$ 10,037	
<b>Total Professional Purchased or Contracted Services</b>	\$ 129,943	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 420,000	
Furniture & Equipment		
Gas/electric	\$ 52,640	
Water/ Sewer	\$ 4,176	
Grounds Keeping	\$ 11,556	
Maintenance Services	\$ 31,646	
Custodial	\$ 84,225	
Waste disposal	\$ 2,124	
Debt Service - GFF/Garatoni (Interest Only)	\$ 23,784	
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	\$ 630,151	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 85,753	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 85,753	
<b>Total Expenditures</b>	\$ 3,203,340	
<b>Carryover/Deficit</b>	\$ 397,084	

Cumulative Carryover/(Deficit) \$ 1,607,428

## Success Academy South Bend - Elementary

Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1, 2019 - June 30, 2020		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 3,489,924	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten		Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 25,000	
Summer School		
Other State Revenue (please describe)		
Other State Revenue (please describe)		
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)		
Title I	\$ 108,000	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Other Revenue Federal sources - Spec Ed Part B	\$ 30,000	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
<b>Other Revenues</b>		
Committed Philanthropic Donations		
Before and After Care Fees		
Interest Income		
Other Inc- Bus pass, student fee, con stand, athletic events	\$ 17,000	
Other - Rental Income - Riverside Church		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	<b>\$ 3,669,924</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,231,628	Use staffing workbook
Substitute Teachers	\$ 14,000	
Professional Development	\$ 10,000	
Bonuses	\$ 140,000	
Other - Athletic officials/referees		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 2,395,628</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 25,000	

Library, periodicals, etc		
Technology		
Assessment materials	\$	2,165
Computers		
Software		
Other classroom supplies	\$	43,297
Field trips, other unclassified items	\$	4,744
Co-curricular & Athletics		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$	75,206
<b>Support Supplies and Resources</b>		
Administrative Computers		
Administrative Software		
Administration Dues, fees, misc expenses	\$	25,943
Office supplies	\$	19,883
Other - Nurse supplies	\$	2,382
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Support Supplies and Resources</b>	\$	48,208
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc	\$	142
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Board Expenses</b>	\$	142
<b>Professional Purchased or Contracted Services</b>		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	3,333
Payroll Services	\$	2,382
Accounting Services	\$	833
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,872
Telephone/Telecommunication Services	\$	15,154
Total Insurance Costs	\$	16,236
Travel	\$	2,165
Postage	\$	541
Special Education Services	\$	25,000
Student Information Services	\$	3,000
Food service		
Transportation		

Nursing Services		
Other - Athletic fees/dues		
Other - Advertising	\$ 15,000	
Other - Meals provided	\$ 2,500	
Other - Rentals	\$ 2,500	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 93,516</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 550,000	
Furniture & Equipment		
Gas/electric	\$ 75,771	
Water/ Sewer	\$ 6,494	
Grounds Keeping	\$ 11,906	
Maintenance Services	\$ 21,861	
Custodial	\$ 154,000	
Waste disposal	\$ 4,330	
Debt Service - GFF/Garatoni (Interest Only)		
Depreciation Expense		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 824,362</b>	
<b>Other</b>		
Contingency		
Charter Administrative Fee	\$ 104,698	Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 104,698</b>	
<b>Total Expenditures</b>	<b>\$ 3,541,760</b>	
<b>Carryover/Deficit</b>	<b>\$ 128,164</b>	

Cumulative Carryover/(Deficit) \$ 494,737



# Career Academy South Bend High School

## Expected Charter School Staffing Needs -- Year 5

Please fill in the expected positions along with salary and benefit estimates. Insert rows as needed. Be certain to include all Administrative Staff positions, in addition to Teachers and positions such as Paraprofessional, Teaching Assistant, Counselor, Therapist, Nurse, etc. as may be appropriate for your school model.

Benefits Assumptions - Please describe how you calculated your benefits and what is included below					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA. are calculated based on 24% of salary.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Asst. Principal for Curriculum	1	61,500	61,500	14,760	76,260
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse	1	23,380	23,380	5,611	28,992
Security	1	14,863	14,863	3,567	18,430
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor	1	33,942	33,942	8,146	42,087
Social worker	1	22,076	22,076	5,298	27,375
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal HS/MS	1	35,875	35,875	8,610	44,485

Principal HS/MS	1	46,125	46,125	11,070	57,195
Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Welding Instructor	1	52,531	52,531	12,607	65,138
Title I para	2	15,029	30,058	7,214	37,272
Foreign Language	1	19,373	19,373	4,649	24,022
Math HS	5	50,690	253,449	60,828	314,277
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Business	1	35,875	35,875	8,610	44,485
Science HS	1	43,870	43,870	10,529	54,399
PE	2	16,400	32,800	7,872	40,672
History HS	3	26,994	80,982	19,436	100,417
PLTW	1	79,950	79,950	19,188	99,138
Social Studies HS	1	40,448	40,448	9,707	50,155
Band	1	17,245	17,245	4,139	21,383
Language Arts HS	3	35,660	106,979	25,675	132,654
Drama	1	19,929	19,929	4,783	24,712
Art	1	16,400	16,400	3,936	20,336
			-		-
<b>TOTAL</b>			1,718,964	412,551	2,131,515

## Career Academy South Bend Middle School

### Expected Charter School Staffing Needs -- Year 5

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Superintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Director of Facilities	1	30,750	30,750	7,380	38,130
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Director of Student Services	1	30,750	30,750	7,380	38,130
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse @ HS Bldg	1	23,380	23,380	5,611	28,992
Nurse @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Security @ HS Bldg	1	14,863	14,863	3,567	18,430
Resource Officer @ MS Bldg SASB	1	2,563	2,563	615	3,178
Director of Work Force Development	1	20,500	20,500	4,920	25,420
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor @ HS Bldg	1	33,942	33,942	8,146	42,087
Counselor @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Social worker @ HS Bldg	1	22,076	22,076	5,298	27,375
Social worker @ MS Bldg SASB	1	25,625	25,625	6,150	31,775
Admin support	5	15,970	79,848	19,163	99,011
Assistant Principal @ HS bldg	1	35,875	35,875	8,610	44,485
Principal @ HS bldg	1	46,125	46,125	11,070	57,195
Assistant Principal @ MS bldg SASB	1	39,975	39,975	9,594	49,569
Principal @ MS bldg SASB	1	43,563	43,563	10,455	54,018

Special Education teacher	5	23,322	116,612	27,987	144,598
Special Education para	2	13,838	27,675	6,642	34,317
Title 1 para	2	16,908	33,815	8,116	41,931
Foreign Language	1	19,373	19,373	4,649	24,022
In house Sub	2	16,400	32,800	7,872	40,672
Choir	1	16,400	16,400	3,936	20,336
Math MS	3	40,304	120,912	29,019	149,931
PE @ HS bldg	2	16,400	32,800	7,872	40,672
PE @ MS bldg SASB	2	16,400	32,800	7,872	40,672
Social Studies MS	2	37,529	75,059	18,014	93,073
Band @ HS bldg	1	17,245	17,245	4,139	21,383
Band @ MS Bldg SASB	1	22,038	22,038	5,289	27,327
Language Arts MS	3	34,862	104,587	25,101	129,688
Science MS	3	47,361	142,083	34,100	176,183
Drama	1	19,793	19,793	4,750	24,543
Art @ HS Bldg	1	16,400	16,400	3,936	20,336
Art @ MS Bldg SASB	1	16,000	16,000	3,840	19,840
Technology Teacher @ MS Bldg SASB	1	17,938	17,938	4,305	22,243
			-		-
<b>TOTAL</b>			1,661,392	398,734	2,060,126

## Success Academy South Bend (Elementary)

### Expected Charter School Staffing Needs -- Year 5

<b>Benefits Assumptions - Please describe how you calculated your benefits and what is included below</b>					
Benefits include TRF, 401k, health insurance, life insurance. Taxes include social security, FUTA, SUTA.					These
Position Description	Number of Staff Per Position	Average Salary for the Position	Total Salary	Benefits and Payroll Taxes	TOTAL Salary and Benefits
			-		-
Superintendent	1	42,708	42,708	10,250	52,958
Assistant to Surperintendent	1	12,642	12,642	3,034	15,676
Director of IT	1	33,483	33,483	8,036	41,519
IT Support Tech	1	11,958	11,958	2,870	14,828
Assistant facilities	1	25,625	25,625	6,150	31,775
Director of Special Education	1	23,233	23,233	5,576	28,809
Director of HR	1	18,792	18,792	4,510	23,302
Director of Development	1	23,917	23,917	5,740	29,657
Development Coordinator	1	11,958	11,958	2,870	14,828
Business Manager	1	18,792	18,792	4,510	23,302
Assistant Business Manager	1	17,425	17,425	4,182	21,607
Accounting Clerk	1	11,958	11,958	2,870	14,828
Buyer	1	9,908	9,908	2,378	12,286
Data Coordinator	1	12,983	12,983	3,116	16,099
Nurse - Elem/MS	1	25,625	25,625	6,150	31,775
Resource Officer - Elem/MS	1	2,563	2,563	615	3,178
Athletic Director	1	20,598	20,598	4,943	25,541
Counselor - Elem/MS	1	25,625	25,625	6,150	31,775
Social worker - Elem/MS	1	25,625	25,625	6,150	31,775
Admin support	2	31,775	63,550	15,252	78,802
Assistant Principal Elem/MS	1	39,975	39,975	9,594	49,569
Principal Elem/MS	1	43,563	43,563	10,455	54,018
Special Education teacher	5	37,925	189,625	45,510	235,135
Special Education para	1	28,700	28,700	6,888	35,588
Kindergarten	5	39,692	198,461	47,631	246,091
1st grade	5	40,713	203,565	48,856	252,421
2nd grade	4	41,000	164,000	39,360	203,360
3rd grade	4	49,407	197,626	47,430	245,056
4th grade	4	41,824	167,297	40,151	207,449
PE -boys/girls	2	16,400	32,800	7,872	40,672
Spanish	1	38,745	38,745	9,299	48,044

General Music	1	22,038	22,038	5,289	27,327
Art	1	16,400	16,400	3,936	20,336
Technology Teacher	1	17,938	17,938	4,305	22,243
			-		-
			-		-
<b>TOTAL</b>			1,799,700	431,928	2,231,628

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 20: Budget Narrative

Revenue Projections:

The Per-Pupil Revenue projections were calculated based on rates projected on the website link [http://ceep.indiana.edu/tools\\_resources/biennium\\_school\\_funding\\_changes\\_data\\_visualization.html](http://ceep.indiana.edu/tools_resources/biennium_school_funding_changes_data_visualization.html) from Indiana University School of Education; Center for Evaluation and Education Policy. For fiscal year 2015-2016, the basic tuition rate is \$6,146 per student; this includes tuition support and complexity. The Special Education rate is \$846 per student, which converts to \$3,133 per Special Education student. CASB currently has a Special Education student population of 27%. Per-Pupil Revenue for Special Education was calculated based on 27% of the enrollment number for the fiscal year. CASB's CTE rate is \$158 per student, which converts to \$523 per CTE student. The current CTE student enrollment is 151; this is for High School only. The Per-Pupil Revenue projection for Fiscal Year 2015-2016 for the High School is as follows:  $(\$6,146 \times 400) + (\$3,133 \times (400 \times 0.27)) + (\$523 \times 151) = \$2,875,737$ . These rates were used across all grade levels for fiscal year 2015-2016.

For fiscal year 2016-2017, the rates are as follows: basic tuition (tuition support and complexity) \$6,315, Special Education \$3,078, and CTE \$473. The Per-Pupil Revenue projection for Fiscal Year 2016-2017 for the High School is as follows:  $(\$6,315 \times 400) + (\$3,078 \times (400 \times .27)) + (\$473 \times 151) = \$2,929,847$ . These rates were used across all grade levels for this fiscal year and the remaining fiscal year projections. There are no donations or fundraising included in the projections. The projections include anticipated revenue from the Charter School Facilities Assistance Program Grant for Fiscal Years 15-16 and 16-17 for all of the schools.

Expense Projections:

We will have two buildings (the existing CASB building on Crescent Circle and the new building on Ardmore Trail) starting with fiscal year 2015-2016. The first building (CASB) will contain grade 7-12. The second building (SASB) will contain grades K-6. There will be three charter schools: Career Academy (High School, grades 9-12), Career Academy Middle School (grades 5 -8) and Success Academy (elementary school, grades K-4). The Career Academy Middle School will be housed in part (grades 7-8) in the Crescent Circle building and in part (grades 5-6) in the Ardmore building. The Middle School is charged with rent to the High School for the Crescent Building and the elementary school is charged with rent to the Middle School for the Ardmore building. Some personnel will be shared between the three schools.

The starting basis used for expense projections is the March 2015 YTD actual expenses for CASB (existing operations grades 5-12) as forecasted through the until the end of the current fiscal year, June 30, 2015. For the five-year projections starting with fiscal year 2015-2016, general expenses were increased by 2%. Other expenses were adjusted to reflect increases in enrollment. Payroll was calculated based on rates for current staffing and projected increases in staffing based on expected student enrollment and the needs at each building. The new building costs were not included in the projections because it will be built and paid for (utilizing funding provided by the Garatoni-Smith Family Foundation) by the start of the new fiscal school year.

The school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget, and its assurance of having sufficient funds to cover all anticipated expenses, including but not limited to start-up costs, special education costs, and required retirement plan contributions, is through the financial support of the Garatoni-Smith Family Foundation. There is no plan or requirement to provide transportation costs to and from school for students other than for Special Education students as required by 511 IAC 7-43-1(u).



Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 21: Existing Schools

The applicant to-date has operated one school:

Career Academy of South Bend (CASB)

3801 Crescent Cir

South Bend, IN 46628-0000

Phone: (574) 299-9800 Fax: (574) 288-6125

Principal: Mr. Paul Schlottman, [pschlottman@careeracademysb.com](mailto:pschlottman@careeracademysb.com)

Currently offering Grade Levels 05 – 12

Opened in August of 2011 serving grade levels 7-9.

Contact information for authorizer:

Marriette R. Siler

Office and Systems Coordinator

Office of Charter Schools

Ball State University

Teachers College TC-912

Muncie, IN 47306

Phone: 765-285-1343

Fax: 765-285-9873

Email: [mrsiler@bsu.edu](mailto:mrsiler@bsu.edu)

Enrollment:

Grade	2011-12	2012-13	2013-14	2014-15
Grade 5				72
Grade 6				46
Grade 7	42	58	33	70
Grade 8	50	67	65	60
Grade 9	59	78	62	90
Grade 10		85	76	66
Grade 11		28	89	64
Grade 12		24	55	41
Total Enrollment	151	340	380	509

For 2014-15: 58% free meals, 9.4% reduced price meals, 32.6% paid meals

For 2014-15: 49.3% white, 28.9% black, 9.6% multi-racial, 10.6% Hispanic, 1% Asian

Special education: for 2013-14: 24.2%; for 2014-15: 27.2% (as of April 2015)

English language learners:  
 2013-14, 5% (19 students)  
 2014-15: 8.7% (43 of 494 students as of 11/3/14 reporting date)

The Career Academy's ISTEP passing rates have been:

% passing ISTEP	2011-2012	2012-2013	2013-2014
Both English & Math	36.5	41.8	53.5
English	45.8	48.4	64.0
Math	47.9	52.7	62.5

2013-14 Growth Model Data for Math:

Grade 7 Median Growth % 43.0  
 Grade 8 Median Growth % 24.0

2013-14 Growth Model Data for English/Language Arts:

Grade 7 Median Growth% 55.0  
 Grade 8 Median Growth% 44.0

2013-14 Passage rates on ECA in English 10: Grade 10: 46.9%, Grade 11: 45.0%

2013-14 Passage rates on ECA in Algebra 1: Grade 8: 50%, Grade 9: 10.7%, Grade 10: 30%

2013-14 and 2012-13 Graduation Rates

2012-2013 25.0%  
 2013-2014 30.6%  
 2013-14 w/o Crossing students 91.6%

Note: The data reported on COMPASS in the 2013-14 Report Card section is for graduates at the end of the 2012-13 school year rather than the 2013-14 graduation rate as shown in the "Student Performance" section under "Graduates." CASB's reported graduation rates for both years are misleading. In the 2012-13 school year, there was no senior class at CASB: the school opened with grades 7-9 in 2011 and added grades 10-11 in 2012-13 but did not add grade 12 until 2013-14. However, CASB enrolled a substantial number of students in 2012-13 as well as in 2013-14 who attended The Crossing, <http://www.crossingeducation.com/>, a dropout-recovery school. Crossing students accounted for CASB's 2012-13 graduation rate of 25% (3 of 12 students). For 2013-14, there were 12 seniors attending CASB, of whom 11 (91.6%) graduated, however, there were 32 12th-grade Crossing students enrolled at CASB at various times, of whom The Crossing informed CASB (but apparently was not reported to IDOE) that six graduated. The COMPASS-reported graduation rate of 30.6% is based on 11 of 36 students. CASB knew when it agreed to enroll Crossing students that doing so would adversely affect CASB's academic data (in multiple ways, of which graduation rate is the most visible). Nonetheless, the reported figure is misleading.

Of the 12 students in the 2013-2014 graduation cohort, 11 graduated with the cohort (91.6% graduation rate). Five of the graduates are attending college, three states they intended to combine local college enrollment and working either part or full time, one stated into to attend a post-secondary trade school focusing on IT, one student reported working fulltime, one student reported intent to either work fulltime or enter the military (she was reported to have been accepted in the military and still uncertain as to her post-graduation plan as of the school's last contact).

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 22: Financial Reports For Schools Operating In Indiana

The applicant has operated only one school, CASB, which opened in August, 2011. The form asks for the last three years of audited financial statements but only two years are available:

Attached are the two available audited financial statements:

- fiscal year ending 6/30/12 covering first year of operation (2011-12)
- fiscal year ending 6/30/13 covering second year of operation (2012-13)

Audit for FYE 6/30/14 has not been completed. There was no audit for FYE 6/30/11 (year prior to start of operations)

Also attached is most recent internal financial statement.

**CAREER ACADEMY OF SOUTH BEND, INC.**

*Financial Statements*

*June 30, 2012*

**Fitzgerald | Isaac** LLC  
Certified Public Accountants

CAREER ACADEMY OF SOUTH BEND, INC.

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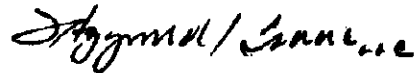
INDEPENDENT AUDITORS' REPORT

The Board of Directors  
Career Academy of South Bend, Inc.

We have audited the accompanying statement of financial position of **Career Academy of South Bend, Inc.** (the "School") as of June 30, 2012 and the related statements of activities and cash flows for the year then ended. These financial statements are the responsibility of the School's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Career Academy of South Bend, Inc. as of June 30, 2012 and the changes in its net assets and its cash flows for the year then ended, in conformity with accounting principles generally accepted in the United States of America.



June 12, 2013

CAREER ACADEMY OF SOUTH BEND, INC.

Statement of Financial Position

Assets	June 30, 2012
Current assets:	
Cash	\$ 70,211
Accounts receivable:	
State education support	505,619
Grants	4,357
Other	42,455
Unconditional promises to give	550,000
Prepaid expenses	4,445
Total current assets	<u>1,177,087</u>
Unconditional promises to give	800,000
Property and equipment:	
Land	159,400
Building and improvements	11,193,290
Furniture, fixtures, and equipment	918,769
Construction-in-progress	42,719
Less: accumulated depreciation	(234,155)
Property and equipment, net	<u>12,080,023</u>
	<u>\$ 14,057,110</u>
 <u>Liabilities and Net Assets</u>	
Current liabilities:	
Accounts payable and accrued expenses	145,969
Current portion of long-term debt	553,840
Total current liabilities	<u>699,809</u>
Accrued interest on Common School Fund loans	22,013
Long-term debt, net of current portion	11,865,249
Total liabilities	<u>12,587,071</u>
Net assets:	
Unrestricted	220,039
Temporarily restricted	1,250,000
Total net assets	<u>1,470,039</u>
	<u>\$ 14,057,110</u>

See accompanying notes to financial statements.

CAREER ACADEMY OF SOUTH BEND, INC.

Statement of Activities

Revenue, Gains and Support	Year Ended June 30, 2012		
	Unrestricted	Temporarily Restricted	Total
State education support	\$ 1,011,239	-	1,011,239
Grant revenue	456,615	1,500,000	1,956,615
Contributions	987,176	-	987,176
Student fees	13,329	-	13,329
Rent	53,068	-	53,068
Other	23,168	-	23,168
Net assets released from restriction	250,000	(250,000)	-
Total revenue, gains and support	<u>2,794,595</u>	<u>1,250,000</u>	<u>4,044,595</u>
<u>Expenses</u>			
Program services:			
Educational instruction	1,396,036	-	1,396,036
Education support	379,704	-	379,704
Administrative	914,303	-	914,303
Total expenses	<u>2,690,043</u>	<u>-</u>	<u>2,690,043</u>
Increase in net assets	104,552	1,250,000	1,354,552
Net assets, beginning of year	<u>115,487</u>	<u>-</u>	<u>115,487</u>
Net assets, end of year	<u>\$ 220,039</u>	<u>1,250,000</u>	<u>1,470,039</u>

See accompanying notes to financial statements.



CAREER ACADEMY OF SOUTH BEND, INC.

Statement of Cash Flows

	Year Ended June 30, 2012
<u>Operating Activities</u>	
Change in net assets	\$ 1,354,552
Adjustment to reconcile change in net assets to cash flows from operating activities:	
Depreciation	234,155
Change in:	
Accounts receivable	(1,847,231)
Prepaid expenses	(4,445)
Accounts payable and accrued expenses	167,982
Net cash used by operating activities	<u>(94,987)</u>
<u>Investing Activities</u>	
Purchase of property and equipment	(12,087,414)
Proceeds from note receivable	7,300
Net cash used by investing activities	<u>(12,080,114)</u>
<u>Financing Activities</u>	
Proceeds from Common School Fund loan	582,218
Proceeds from other long-term debt	12,268,882
Principal repayments of long-term debt	(630,511)
Net cash provided by financing activities	<u>12,220,589</u>
Net increase in cash	45,488
Cash, beginning of year	<u>24,723</u>
Cash, end of year	<u>\$ 70,211</u>
Supplementary information:	
Cash payments for interest expense	\$ 47,669

See accompanying notes to financial statements.

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

June 30, 2012

#### (1) Summary of Significant Accounting Policies

##### General

Career Academy of South Bend, Inc. (the "School") is a public benefit not-for-profit organization incorporated under the laws of the State of Indiana. The School operates a public charter school established under Indiana Code 20-24 and is sponsored by Ball State University. The School commenced operations as of August 2011.

##### Financial Statement Presentation

The School reports its financial position and activities according to three classes of assets as follows:

- Unrestricted net assets, which represent net assets that the Board of Directors has discretionary control to use in carrying on the activities of the School in accordance with its articles of incorporation and by-laws.
- Temporarily restricted net assets, which represent net assets restricted by the donor, grantor, or other outside party for a specific purpose or until the passage of time.
- Permanently restricted net assets, which represent net assets that are subject to restriction by gift instruments requiring that the principal be invested in perpetuity and only the income be expended, or assets donated with the provision that they not be sold. There were no permanently restricted net assets as of June 30, 2012.

##### Accounting Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Actual results could differ from those estimates.

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

#### (1) Summary of Significant Accounting Policies, Continued

##### Revenue Recognition

Revenues primarily come from resources provided under the Indiana Charter Schools Act. Under the Act, the School receives an amount per student in relation to the funding received by public schools in the same geographic area. Funding from the State of Indiana is based on enrollment, and is paid in equal monthly installments in January through December following the start of the school year. Revenue is recognized in the year in which the educational services are rendered.

A portion of the School's revenue is the product of cost reimbursement grants. Accordingly, the School recognizes revenue under these grants in the amount of costs and expenses at the time they are incurred.

##### Accounts Receivable

Accounts receivable relate primarily to activities funded under federal grants and legislation enacted by the State of Indiana. The School believes that it is operating in compliance with regulatory requirements and as such no allowance for doubtful accounts is deemed necessary.

##### Contributions

Contributions received and unconditional promises to give are measured at their fair values and are reported as an increase in net assets. The School reports gifts of cash and other assets as restricted support if they are received with donor stipulations that limit the use of the donated assets, or if they are designated as support for future periods. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(1) Summary of Significant Accounting Policies, Continued

Property and Equipment

Purchases of these assets and expenditures that materially increase value or extend useful lives are capitalized and are included in the accounts at cost. Routine maintenance and repairs, and minor replacement costs are charged to expense as incurred.

Depreciation is provided over the estimated useful lives of the respective assets using the straight-line method. The estimated useful lives generally are as follows:

Building and improvements .....	39 years
Furniture, fixtures, and equipment .....	3 to 7 years

Taxes on Income

Career Academy of South Bend, Inc. has received a determination from the U.S. Treasury Department stating that it qualifies under the provisions of Section 501(c)(3) of the Internal Revenue Code as a tax-exempt organization; however, the School would be subject to tax on income unrelated to its tax-exempt purpose. For the year ended June 30, 2012, no accounting for federal and state income taxes was required to be included in the accompanying financial statements.

Professional standards require the School to recognize a tax liability only if it is more likely than not the tax position would be sustained in a tax examination, with a tax examination being presumed to occur. The amount recognized is the largest amount of tax liability that is greater than 50% likely of being realized on examination. For tax positions not meeting the more-likely-than-not test, no tax liability is recorded. The School has examined this issue and has determined that there are no material contingent tax liabilities or questionable tax positions.

Subsequent Events

The School evaluated subsequent events through June 12, 2013, the date these financial statements were available to be issued. Events occurring through that date have been evaluated to determine whether a change in the financial statements or related disclosures would be required.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(2) Accounts Receivable

Accounts receivable for state education support as of June 30, 2012 represent amounts due relating to the following sources:

Tuition support .....	\$450,680
Special education grant .....	<u>54,939</u>
Total.....	<u>\$505,619</u>

Tuition support is determined by state law and is dependent upon the geographic location of the school and is indexed to the poverty data of the enrolled students. The payment schedule is likewise determined by state law, with tuition support payable in equal monthly installments in the calendar year following the start of the school year. Upon revocation or termination of the charter, the payment streams will cease and any unpaid amounts will be applied to the unpaid balance of notes from the Indiana Common School Fund (see Note 4).

(3) Unconditional Promises to Give

Unconditional promises to give consisted of the following as of June 30, 2012:

Restricted to payment of debt obligation .....	\$1,250,000
Restricted for building improvements.....	<u>100,000</u>
Gross unconditional promises to give .....	<u>\$1,350,000</u>
Amounts due in:	
Less than one year .....	\$ 550,000
One to five years.....	<u>800,000</u>
	<u>\$1,350,000</u>

Unconditional promises to give have not been discounted because they either provide for interest on the unpaid balance, or are payable currently.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(4) Long-Term Debt

Long-term debt at June 30, 2012 consisted of the following:

Note payable to the City of South Bend, Indiana (and The Garatoni Family Foundation, as bond holder) relating to the issuance of Economic Development Revenue Bonds, payable \$125,000 quarterly, plus interest at 4% per annum, secured by land and building.....	\$ 1,250,000
Unsecured note payable to The Garatoni Family Foundation, due and payable December 31, 2015, plus interest at 1% per annum...	3,574,346
Unsecured note payable to Larry Garatoni, due and payable December 31, 2015, plus interest at 1% per annum.....	6,320,612
Term note payable to Crescent Michiana Properties LLC, payable \$8,520 monthly, including interest at 7.25% per annum, maturing in October 2021, secured by land and building and guaranteed by The Garatoni Family Foundation.....	691,913
Note payable to the Indiana Common School Fund, payable \$14,555 semi-annually beginning July 1, 2013, plus interest at 4% per annum, maturing in July 2033, secured by unpaid tuition support distributions (see Note 2) .....	<u>582,218</u>
Total long-term debt.....	12,419,089
Less: current portion.....	<u>(553,840)</u>
	<u>\$11,865,249</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(4) Long-Term Debt, Continued

Principal maturities of long-term debt are scheduled as follows:

Year Ending June 30:	
2013 .....	\$ 553,840
2014 .....	586,987
2015 .....	10,236,284
2016 .....	95,989
2017 .....	101,002
Thereafter .....	<u>844,987</u>
	<u>\$12,419,089</u>

(5) Leases

The School leases certain items of equipment under operating leases. The equipment leases provide for monthly lease payments through April 2017. Lease expense under operating leases for the year ended June 30, 2012 was \$9,516.

Future minimum lease obligations are as follows:

<u>Year Ended June 30:</u>	
2013 .....	\$7,076
2014 .....	7,076
2015 .....	7,076
2016 .....	7,076
2017 .....	1,328

(6) Commitments

The School operates under a charter granted by Ball State University. As the sponsoring organization, Ball State University exercises certain oversight responsibilities. Under this charter, the School has agreed to pay to Ball State University an annual administrative fee equal to 3% of state tuition support. The charter remains in effect until June 30, 2016 and is renewable thereafter by mutual consent. Payments under this charter agreement were \$27,044 for the year ended June 30, 2012.

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

#### (7) Retirement Plan

Retirement benefits for certified teachers are provided by the Indiana State Teachers' Retirement Fund ("TRF"), which is a multiple-employer defined benefit retirement plan governed by the State of Indiana and administered by the Indiana Public Retirement System ("INPRS") Board. Contribution requirements of plan members are established by the INPRS Board. Under the plan, the School contributes 7.5% of compensation for all participating personnel. Employees can opt to participate in a 401(k) plan offered through Freedom Retirement Plan Consultants, Inc. in lieu of participating in TRF. The School also contributes 7.5% of compensation to the 401(k) plan. Substantially all full-time employees are eligible to participate in either plan. Retirement plan expense under both plans for the year ended June 30, 2012 was \$52,302.

#### (8) Related Party Transactions

In the year ended June 30, 2012, the School obtained financing from The Garatoni Family Foundation and Larry Garatoni, individually (see Note 4), relating to the construction of the school facility. Larry Garatoni is the President of the School's Board of Directors and the chief executive officer of HQ Investments Corporation, which manages the investments of The Garatoni Family Foundation. The School also received contributions totaling \$710,000 directly and indirectly from The Garatoni Family Foundation in the year ended June 30, 2012.

#### (9) Restrictions on Net Assets

Temporarily restricted net assets represent an original \$1,500,000 pledge of tax increment revenues by the South Bend Redevelopment Commission toward the repayment of the School's debt obligation under the City of South Bend economic development revenue bonds (see Note 4). These amounts are considered to be temporarily restricted in that they are limited as to use in future periods. The pledge is to be paid in quarterly installments through November 2014. Payments of \$250,000 were received in the year ended June 30, 2012.



CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(10) Risks and Uncertainties

The School provides educational instruction services to families residing in St. Joseph and surrounding counties in Indiana, and is subject to the risks of economic and competitive forces at work within this geographic area.

The majority of revenues relate to legislation enacted by the State of Indiana and grants awarded under federal programs. Changes in state or federal legislation could significantly affect the School. Additionally, the School is subject to monitoring and audit by state and federal agencies. Those examinations may result in additional liability to be imposed on the School.

Financial instruments that potentially subject the School to concentrations of credit risk consist principally of receivables from the State of Indiana. At June 30, 2012, substantially all of the accounts receivable balance was due from the State of Indiana.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(11) Functional Expense Reporting

The costs of providing the educational activities have been summarized on a functional basis in the statement of activities. Accordingly, certain expenses have been allocated among the programs and services benefited. Following is a summary of expenses comprising each program and service for the year ended June 30, 2012:

	<u>Educational</u> <u>Instruction</u>	<u>Education</u> <u>Support</u>	<u>Admini-</u> <u>strative</u>
Salaries and wages.....	\$ 668,319	99,908	349,828
Employee benefits .....	157,693	25,946	118,218
Professional services .....	40,029	21,959	107,715
Staff development and recruitment .....	41,045	-	-
Authorizer oversight fee .....	-	-	27,044
Food costs .....	-	36,355	-
Travel/transportation service.....	1,680	1,240	10,094
Equipment and rentals .....	10,595	-	24,796
Repairs and maintenance.....	-	4,399	-
Classroom, kitchen and office supplies .....	132,490	16,521	23,458
Occupancy .....	107,816	157,275	-
Advertising .....	-	-	58,183
Depreciation .....	234,155	-	-
Interest .....	-	-	162,951
Insurance .....	-	-	5,086
Other .....	<u>2,214</u>	<u>16,101</u>	<u>26,930</u>
	<u>\$1,396,036</u>	<u>379,704</u>	<u>914,303</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Other Reports

Year Ended June 30, 2012

The report presented herein was prepared in addition to another official report prepared for the School as listed below:

Supplemental Audit Report of Career Academy of South Bend, Inc.

The Supplemental Audit Report contains the results of compliance testing required by the Indiana State Board of Accounts under its *Guidelines for the Audits of Charter Schools Performed by Private Examiners* pertaining to matters addressed in its *Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools*.

**CAREER ACADEMY OF SOUTH BEND, INC.**

*Financial Statements*

*June 30, 2013 and 2012*

**Fitzgerald Isaac LLC**  
Certified Public Accountants

CAREER ACADEMY OF SOUTH BEND, INC.

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## INDEPENDENT AUDITOR'S REPORT

The Board of Directors  
Career Academy of South Bend, Inc.

### **Report on the Financial Statements**

We have audited the accompanying financial statements of **Career Academy of South Bend, Inc.**, which comprise the statements of financial position as of June 30, 2013 and 2012, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's Responsibility**

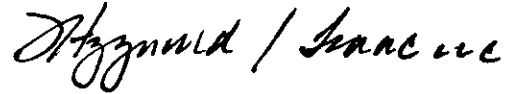
Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Career Academy of South Bend, Inc. as of June 30, 2013 and 2012, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

A handwritten signature in black ink, appearing to read "Raymond J. Hancock". The signature is written in a cursive style with a large initial 'R' and 'H'.

Indianapolis, IN  
April 24, 2014

CAREER ACADEMY OF SOUTH BEND, INC.

Statements of Financial Position

	June 30	
Assets	2013	2012
Current assets:		
Cash	\$ 557,242	70,211
Accounts receivable:		
State education support	-	505,619
Grants	30,436	4,357
Other	188	42,455
Unconditional promises to give	550,000	550,000
Prepaid expenses	-	4,445
Total current assets	1,137,866	1,177,087
Unconditional promises to give	250,000	800,000
Property and equipment:		
Land	159,400	159,400
Building and improvements	11,509,803	11,193,290
Furniture, fixtures, and equipment	1,141,242	918,769
Construction-in-progress	-	42,719
Less: accumulated depreciation	(726,840)	(234,155)
Property and equipment, net	12,083,605	12,080,023
	\$ 13,471,471	14,057,110
<b>Liabilities and Net Assets</b>		
Current liabilities:		
Accounts payable and accrued expenses	\$ 84,129	145,969
Current portion of long-term debt	557,876	553,840
Refundable advances	51,119	-
Total current liabilities	693,124	699,809
Accrued interest on Common School Fund loans	-	22,013
Long-term debt, net of current portion	12,047,178	11,865,249
Total liabilities	12,740,302	12,587,071
Net assets (deficiency):		
Unrestricted	(118,831)	220,039
Temporarily restricted	850,000	1,250,000
Total net assets	731,169	1,470,039
	\$ 13,471,471	14,057,110

See accompanying notes to financial statements.



CAREER ACADEMY OF SOUTH BEND, INC.

Statement of Activities

	Year Ended June 30, 2013		
	Unrestricted	Temporarily Restricted	Total
<b>Revenue and Support</b>			
State education support	\$ 2,555,786	-	2,555,786
Grant revenue	720,812	-	720,812
Contributions	11,003	100,000	111,003
Student fees	47,473	-	47,473
Rent	137,299	-	137,299
Other	29,173	-	29,173
Net assets released from restriction	500,000	(500,000)	-
Total revenue and support	4,001,546	(400,000)	3,601,546
<b>Expenses</b>			
Program services:			
Educational instruction	2,858,682	-	2,858,682
Education support	391,960	-	391,960
Administrative	1,166,676	-	1,166,676
Total expenses	4,417,318	-	4,417,318
Change in net assets before non-operating activity	(415,772)	(400,000)	(815,772)
<b>Non-Operating Activity</b>			
Gain due to changes in legislative funding	76,902	-	76,902
Change in net assets	(338,870)	(400,000)	(738,870)
Net assets, beginning of year	220,039	1,250,000	1,470,039
Net assets (deficiency), end of year	\$ (118,831)	850,000	731,169

See accompanying notes to financial statements.

CAREER ACADEMY OF SOUTH BEND, INC.

Statement of Activities

	Year Ended June 30, 2012		
	Unrestricted	Temporarily Restricted	Total
<u>Revenue and Support</u>			
State education support	\$ 1,011,239	-	1,011,239
Grant revenue	456,615	1,500,000	1,956,615
Contributions	987,176	-	987,176
Student fees	13,329	-	13,329
Rent	53,068	-	53,068
Other	23,168	-	23,168
Net assets released from restriction	250,000	(250,000)	-
Total revenue and support	<u>2,794,595</u>	<u>1,250,000</u>	<u>4,044,595</u>
<u>Expenses</u>			
Program services:			
Educational instruction	1,553,311	-	1,553,311
Education support	222,429	-	222,429
Administrative	914,303	-	914,303
Total expenses	<u>2,690,043</u>	<u>-</u>	<u>2,690,043</u>
Change in net assets	104,552	1,250,000	1,354,552
Net assets, beginning of year	<u>115,487</u>	<u>-</u>	<u>115,487</u>
Net assets, end of year	<u>\$ 220,039</u>	<u>1,250,000</u>	<u>1,470,039</u>

See accompanying notes to financial statements.

CAREER ACADEMY OF SOUTH BEND, INC.

Statements of Cash Flows

	Year Ended June 30	
	2013	2012
<u>Operating Activities</u>		
Change in net assets	\$ (738,870)	1,354,552
Adjustment to reconcile change in net assets to cash flows from operating activities:		
Depreciation	492,685	234,155
Gain due to changes in legislative funding	(76,902)	-
Change in:		
Accounts receivable	(756,086)	(1,847,231)
Prepaid expenses	4,445	(4,445)
Unconditional promises to give	550,000	-
Accounts payable and accrued expenses	(22,496)	167,982
Refundable advances	51,119	-
Net cash used by operating activities	(496,105)	(94,987)
 <u>Investing Activities</u>		
Purchase of property and equipment	(496,267)	(12,087,414)
Proceeds from note receivable	-	7,300
Net cash used by investing activities	(496,267)	(12,080,114)
 <u>Financing Activities</u>		
Proceeds from Common School Fund loan	711,220	582,218
Proceeds from other long-term debt, net of repayments	768,183	11,638,371
Net cash provided by financing activities	1,479,403	12,220,589
 Net increase in cash	487,031	45,488
 Cash, beginning of year	70,211	24,723
 Cash, end of year	\$ 557,242	70,211
 Supplementary information:		
Cash payments for interest expense	\$ 209,509	47,669

See accompanying notes to financial statements.

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

June 30, 2013 and 2012

#### (1) Summary of Significant Accounting Policies

##### General

Career Academy of South Bend, Inc. (the "School") is a public benefit not-for-profit organization incorporated under the laws of the State of Indiana. The School operates a public charter school established under Indiana Code 20-24 and is sponsored by Ball State University.

##### Financial Statement Presentation

The School reports its financial position and activities according to three classes of assets as follows:

- Unrestricted net assets, which represent net assets that the Board of Directors has discretionary control to use in carrying on the activities of the School in accordance with its articles of incorporation and by-laws.
- Temporarily restricted net assets, which represent net assets restricted by the donor, grantor, or other outside party for a specific purpose or until the passage of time.
- Permanently restricted net assets, which represent net assets that are subject to restriction by gift instruments requiring that the principal be invested in perpetuity and only the income be expended, or assets donated with the provision that they not be sold. There were no permanently restricted net assets as of June 30, 2013 or 2012.

##### Accounting Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Actual results could differ from those estimates.

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

#### (1) Summary of Significant Accounting Policies, Continued

##### Revenue Recognition

Revenues primarily come from resources provided under the Indiana Charter Schools Act. Under the Act, the School receives an amount per student in relation to the funding received by other public schools in the same geographic area. Funding from the State of Indiana is based on enrollment, and is paid in equal monthly installments in January through December following the start of the academic school year. Revenue is recognized in the year in which the educational services are rendered.

A portion of the School's revenue is the product of cost reimbursement grants. Accordingly, the School recognizes revenue under these grants in the amount of costs and expenses at the time they are incurred.

##### Accounts Receivable

Accounts receivable relate primarily to activities funded under federal grants and legislation enacted by the State of Indiana. The School believes that it is operating in compliance with regulatory requirements and as such no allowance for doubtful accounts is deemed necessary.

##### Contributions

Contributions received and unconditional promises to give are measured at their fair values and are reported as an increase in net assets. The School reports gifts of cash and other assets as restricted support if they are received with donor stipulations that limit the use of the donated assets, or if they are designated as support for future periods. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statements of activities as net assets released from restriction.

##### Reclassifications

Certain figures for 2012 that were previously reported have been reclassified for comparative purposes.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(1) Summary of Significant Accounting Policies, Continued

Property and Equipment

Purchases of these assets and expenditures that materially increase value or extend useful lives are capitalized and are included in the accounts at cost. Routine maintenance and repairs, and minor replacement costs are charged to expense as incurred.

Depreciation is provided over the estimated useful lives of the respective assets using the straight-line method. The estimated useful lives generally are as follows:

Building and improvements .....	39 years
Furniture, fixtures, and equipment .....	3 to 7 years

Taxes on Income

Career Academy of South Bend, Inc. has received a determination from the U.S. Treasury Department stating that it qualifies under the provisions of Section 501(c)(3) of the Internal Revenue Code as a tax-exempt organization; however, the School would be subject to tax on income unrelated to its tax-exempt purpose. For the year ended June 30, 2013 and 2012, no accounting for federal and state income taxes was required to be included in the accompanying financial statements.

Professional accounting standards require the School to recognize a tax liability only if it is more likely than not the tax position would be sustained in a tax examination, with a tax examination being presumed to occur. The amount recognized is the largest amount of tax liability that is greater than 50% likely of being realized on examination. For tax positions not meeting the more-likely-than-not test, no tax liability is recorded. The School has examined this issue and has determined that there are no material contingent tax liabilities or questionable tax positions. The tax year ending 2012 is open to audit for both federal and state purposes.

Subsequent Events

The School evaluated subsequent events through April 24, 2014, the date these financial statements were available to be issued. Events occurring through that date have been evaluated to determine whether a change in the financial statements or related disclosures would be required.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(2) Legislative Funding Changes

In 2013, the Indiana legislature passed amendments to the Indiana Charter Schools Act that altered the manner in which charter schools are funded. Prior to enactment, charter schools received funding in the calendar year following the start of the academic school year. As such, the School followed the practice of recognizing at June 30 a receivable for payments to be made to the School in the subsequent July through December time period, which represented amounts due for services rendered. Effective July 1, 2013, school funding will be paid following the State of Indiana fiscal year of July to June, which is similar to the School's academic year. As part of this legislative amendment, the funding owed to the School under prior legislation for the period July to December 2013 will no longer be paid.

In the same session, the Indiana legislature appropriated funding from the Indiana general fund to repay Indiana Common School Fund loans and accrued interest outstanding as of June 30, 2013 on behalf of charter schools. The School has applied for and received repayment of its indebtedness under these obligations as of June 30, 2013.

The effect of these legislative amendments has been reflected in the accompanying statement of activities as a gain due to changes in legislative funding and is comprised of the following:

Repayment of Common School Fund loans.....	\$1,293,438
Repayment of accrued interest on Common School Fund loans.....	<u>61,357</u>
	1,354,795
Elimination of School funding .....	<u>(1,277,893)</u>
	\$ <u>76,902</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(3) Accounts Receivable

Accounts receivable for state education support as of June 30, 2012 represented amounts due relating to the following sources:

Tuition support .....	\$450,680
Special education grant .....	<u>54,939</u>
Total.....	<u>\$505,619</u>

Tuition support is determined by state law and is dependent upon the geographic location of the school and is indexed to the poverty data of the enrolled students and other factors. The payment schedule is likewise determined by state law, with tuition support payable in equal monthly installments in the calendar year following the start of the academic school year. Effective July 1, 2013, tuition support will be paid in monthly installments that coincide with the School's fiscal year (see Note 2).

(4) Unconditional Promises to Give

Unconditional promises to give consisted of the following as of June 30, 2013 and 2012:

	<u>2013</u>	<u>2012</u>
Restricted to payment of debt obligation .....	\$750,000	1,250,000
Restricted for building improvements.....	<u>50,000</u>	<u>100,000</u>
Gross unconditional promises to give .....	<u>\$800,000</u>	<u>1,350,000</u>
Amounts due in:		
Less than one year .....	\$550,000	550,000
One to five years.....	<u>250,000</u>	<u>800,000</u>
	<u>\$800,000</u>	<u>1,350,000</u>

Unconditional promises to give have not been discounted because they either provide for interest on the unpaid balance, or are payable currently.



CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(5) Long-Term Debt

Long-term debt at June 30, 2013 and 2012 consisted of the following:

	<u>2013</u>	<u>2012</u>
Note payable to the City of South Bend, Indiana (and The Garatoni Family Foundation, as bond holder) relating to the issuance of Economic Development Revenue Bonds, payable \$125,000 quarterly, plus interest at 4% per annum, secured by land and building .....	\$750,000	1,250,000
Unsecured note payable to The Garatoni Family Foundation, due and payable December 31, 2015, plus interest at 1% per annum .....	3,552,946	3,574,346
Unsecured note payable to Larry Garatoni, due and payable December 31, 2015, plus interest at 1% per annum.....	7,664,035	6,320,612
Term note payable to Crescent Michiana Properties LLC, payable \$8,520 monthly, including interest at 7.25% per annum, maturing in October 2021, secured by land and building and guaranteed by The Garatoni Family Foundation .....	638,073	691,913
Note payable to the Indiana Common School Fund, payable \$14,555 semi-annually beginning July 1, 2013, plus interest at 4% per annum, maturing in July 2033, secured by unpaid tuition support distributions .....	-	<u>582,218</u>
Total long-term debt.....	<u>12,605,054</u>	<u>12,419,089</u>
Less: current portion	<u>(557,876)</u>	<u>(553,840)</u>
	<u>\$12,047,178</u>	<u>11,865,249</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(3) Accounts Receivable

Accounts receivable for state education support as of June 30, 2012 represented amounts due relating to the following sources:

Tuition support .....	\$450,680
Special education grant .....	<u>54,939</u>
Total.....	<u>\$505,619</u>

Tuition support is determined by state law and is dependent upon the geographic location of the school and is indexed to the poverty data of the enrolled students and other factors. The payment schedule is likewise determined by state law, with tuition support payable in equal monthly installments in the calendar year following the start of the academic school year. Effective July 1, 2013, tuition support will be paid in monthly installments that coincide with the School's fiscal year (see Note 2).

(4) Unconditional Promises to Give

Unconditional promises to give consisted of the following as of June 30, 2013 and 2012:

	<u>2013</u>	<u>2012</u>
Restricted to payment of debt obligation .....	\$750,000	1,250,000
Restricted for building improvements.....	<u>50,000</u>	<u>100,000</u>
Gross unconditional promises to give .....	<u>\$800,000</u>	<u>1,350,000</u>
Amounts due in:		
Less than one year .....	\$550,000	550,000
One to five years.....	<u>250,000</u>	<u>800,000</u>
	<u>\$800,000</u>	<u>1,350,000</u>

Unconditional promises to give have not been discounted because they either provide for interest on the unpaid balance, or are payable currently.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(5) Long-Term Debt, Continued

Principal maturities of long-term debt are scheduled as follows:

Year Ending June 30:	
2014 .....	\$ 557,876
2015 .....	312,214
2016 .....	11,283,859
2017 .....	71,891
2018 .....	77,279
Thereafter .....	<u>301,935</u>
	<u>\$12,605,054</u>

(6) Leases

The School leases certain items of equipment under operating leases. The equipment leases provide for monthly lease payments through April 2017. Lease expense under operating leases for the years ended June 30, 2013 and 2012 was \$7,076 and \$9,516.

Future minimum lease obligations are as follows:

<u>Year Ended June 30:</u>	
2014 .....	\$7,076
2015 .....	7,076
2016 .....	7,076
2017 .....	1,328

(7) Commitments

The School operates under a charter granted by Ball State University. As the sponsoring organization, Ball State University exercises certain oversight responsibilities. Under this charter, the School has agreed to pay to Ball State University an annual administrative fee equal to 3% of state tuition support. The charter remains in effect until June 30, 2016 and is renewable thereafter by mutual consent. Payments under this charter agreement were \$32,513 and \$27,044 for the years ended June 30, 2013 and 2012, respectively.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(8) Retirement Plan

Retirement benefits for certified teachers are provided by the Indiana State Teachers' Retirement Fund ("TRF"), which is a multiple-employer defined benefit retirement plan governed by the State of Indiana and administered by the Indiana Public Retirement System ("INPRS") Board. Contribution requirements of plan members are established by the INPRS Board. Under the plan, the School contributes 7.5% of compensation for all participating personnel. Employees can opt to participate in a 401(k) plan offered through Freedom Retirement Plan Consultants, Inc. in lieu of participating in TRF. The School also contributes 7.5% of compensation to the 401(k) plan. Substantially all full-time employees are eligible to participate in either plan. Retirement plan expense under both plans for the years ended June 30, 2013 and 2012 was \$111,986 and \$52,302, respectively.

(9) Related Party Transactions

In the years ended June 30, 2013 and 2012, the School obtained financing from The Garatoni Family Foundation and Larry Garatoni, individually (see Note 5), relating to the construction of the school facility. Larry Garatoni is the President of the School's Board of Directors and the chief executive officer of HQ Investments Corporation, which manages the investments of The Garatoni Family Foundation. The School also received contributions totaling \$710,000 directly and indirectly from The Garatoni Family Foundation in the year ended June 30, 2012.

(10) Restrictions on Net Assets

Temporarily restricted net assets as of December 31, 2013 and 2012 were available for the following purposes:

	<u>2013</u>	<u>2012</u>
Debt obligation repayment .....	\$750,000	1,250,000
Purchase of welding equipment. ....	<u>100,000</u>	<u>-</u>
	<u>\$850,000</u>	<u>1,250,000</u>

## CAREER ACADEMY OF SOUTH BEND, INC.

### Notes to Financial Statements

#### (10) Restrictions on Net Assets, Continued

Net assets were released from donor restrictions by incurring expenses satisfying the restricted purpose. In 2013 and 2012, the program purpose restrictions were accomplished by the repayment of required debt obligations.

Temporarily restricted net assets for debt obligation repayment represent an original \$1,500,000 pledge of tax increment revenues by the South Bend Redevelopment Commission toward the repayment of the School's debt obligation under the City of South Bend economic development revenue bonds (see Note 5). These amounts are considered to be temporarily restricted in that they are limited as to use in future periods. The pledge is to be paid in quarterly installments through November 2014. Payments of \$500,000 and \$250,000 were received in the years ended June 30, 2013 and 2012.

#### (11) Risks and Uncertainties

The School provides educational instruction services to families residing in St. Joseph and surrounding counties in Indiana, and is subject to the risks of economic and competitive forces at work within this geographic area.

The majority of revenues relate to legislation enacted by the State of Indiana and grants awarded under federal programs. Changes in state or federal legislation could significantly affect the School. Additionally, the School is subject to monitoring and audit by state and federal agencies. Those examinations may result in additional liability to be imposed on the School.

Financial instruments that potentially subject the School to concentrations of credit risk consist principally of receivables from the State of Indiana. At June 30, 2013 and 2012, substantially all of the accounts receivable balance was due from the State of Indiana.

#### (12) Refundable Advances

The School has been awarded grants from the Indiana Department of Education to provide educational instruction. The grants are considered to be exchange transactions. Accordingly, revenue is recognized when earned and expenses are recognized as incurred. At June 30, 2013, the School had refundable grant advances in excess of expenditures of \$51,119.

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(13) Functional Expense Reporting

The costs of providing the educational activities have been summarized on a functional basis in the statement of activities. Accordingly, certain expenses have been allocated among the programs and services benefited. Following is a summary of expenses comprising each program and service for the years ended June 30, 2013 and 2012:

	<u>2013</u>		
	<u>Educational</u>	<u>Education</u>	<u>Admini-</u>
	<u>Instruction</u>	<u>Support</u>	<u>strative</u>
Salaries and wages.....	\$1,103,018	176,810	463,805
Employee benefits.....	283,310	38,586	121,860
Professional services .....	312,720	26,031	119,259
Staff development and recruitment .....	18,213	-	-
Authorizer oversight fee .....	-	-	32,513
Food costs.....	-	15,674	-
Travel/transportation service.....	12,207	16,814	14,083
Equipment and rentals.....	14,895	-	31,077
Repairs and maintenance.....	-	59,909	-
Classroom, kitchen and office supplies .....	400,828	38,032	33,614
Occupancy .....	217,116	-	-
Advertising .....	-	-	84,564
Depreciation .....	492,685	-	-
Interest.....	-	-	209,638
Insurance .....	-	-	21,288
Other.....	<u>3,690</u>	<u>20,104</u>	<u>34,975</u>
	<u>\$2,858,682</u>	<u>391,960</u>	<u>1,166,676</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Notes to Financial Statements

(13) Functional Expense Reporting, Continued

	<u>2012</u>		
	<u>Educational</u>	<u>Education</u>	<u>Admini-</u>
	<u>Instruction</u>	<u>Support</u>	<u>strative</u>
Salaries and wages.....	\$ 668,319	99,908	349,828
Employee benefits .....	157,693	25,946	118,218
Professional services .....	40,029	21,959	107,715
Staff development and recruitment .....	41,045	-	-
Authorizer oversight fee .....	-	-	27,044
Food costs .....	-	36,355	-
Travel/transportation service .....	1,680	1,240	10,094
Equipment and rentals .....	10,595	-	24,796
Repairs and maintenance .....	-	4,399	-
Classroom, kitchen and office supplies .....	132,490	16,521	23,458
Occupancy .....	265,091	-	-
Advertising .....	-	-	58,183
Depreciation .....	234,155	-	-
Interest .....	-	-	162,951
Insurance .....	-	-	5,086
Other .....	<u>2,214</u>	<u>16,101</u>	<u>26,930</u>
	<u>\$1,553,311</u>	<u>222,429</u>	<u>914,303</u>

CAREER ACADEMY OF SOUTH BEND, INC.

Other Reports

Year Ended June 30, 2013

The report presented herein was prepared in addition to another official report prepared for the School as listed below:

Supplemental Audit Report of Career Academy of South Bend, Inc.

The Supplemental Audit Report contains the results of compliance testing required by the Indiana State Board of Accounts under its *Guidelines for the Audits of Charter Schools Performed by Private Examiners* pertaining to matters addressed in its *Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools*.



**Career Academy South Bend**  
**March 2015 Financial Results**  
**Significant Items**

**Receipts:**

1. Total receipts were \$330k, which is \$60k under budget.  
Grants under budget by \$34k  
Textbook reimbursement from students budgeted for \$26K, didn't receive

**Expenses:**

1. Total expenses before depreciation were \$545k, \$93k over budget.  
Significant differences from budget were:
  - Employee Benefits over budget by \$34k  
Two health insurance premiums paid in March
  - Facilities and Utilities over budget by \$27K -  
due to an emergency water problem

**Month Net Loss before Depreciation and Amortization was \$(215k), \$153k over budget**

**YTD Net Income before Depreciation and Amortization was \$139k, \$623k under budget**

**Schedules Included:**

1. Revenue and Expense Summary - P&L
2. Balance Sheet
3. Statement of Cash Flows
4. Loan Activity
5. Monthly Revenue and Expense Summary
6. Monthly Revenue and Expense Detail

Career Academy South Bend

**Revenue and Expense Summary - P&L**

For the Month Ending March 31, 2015

Fiscal	Month				Year-to-Date		
	Actual	Budget	A + / (-) B	Notes:	Actual	Budget	A + / (-) B
<b>Receipts (Revenue):</b>							
Basic grants and other	1	321,287	355,273	(33,986)	2,922,949	2,946,259	(23,310)
Private donations	2	224	-	224	1,022,784	175,000	847,784
Rental income	3	1,300	1,408	(108)	10,400	12,675	(2,275)
Other misc income	4	7,312	33,566	(26,254)	70,174	174,130	(103,956)
		-	-	-	-	-	-
<b>Total Receipts</b>		330,123	390,247	(60,124)	4,026,308	3,308,064	718,243
<b>Expenses:</b>							
Employee salaries	5	270,060	265,452	4,608	2,237,497	2,155,265	82,232
Employee benefits	6	118,175	83,799	34,376	536,753	670,804	(134,051)
Prof/Technical/Training/Other	7	12,360	3,273	9,087	44,520	49,748	(5,228)
Facility and utilities	8	59,524	32,578	26,946	288,654	310,366	(21,711)
Professional & Outside Services	9	37,218	27,076	10,143	251,429	220,945	30,484
Textbooks	10	-	1,007	(1,007)	57,094	70,744	(13,650)
Supplies and Materials	11	17,004	13,596	3,408	260,636	136,619	124,017
Advertising	12	15,925	6,875	9,050	74,034	35,000	39,034
Other Expenses	13	4,103	7,752	(3,649)	40,611	45,275	(4,664)
Interest	14	10,436	10,683	(248)	96,058	96,793	(734)
		-	-	-	-	-	-
<b>Total Expenses</b>		544,804	452,091	92,713	3,887,287	3,791,559	95,728
<b>Net Earnings (Loss) Before Depreciation and Amortization</b>		(214,681)	(61,843)	(152,837)	139,020	(483,494)	622,515
<b>Depreciation and Amortization</b>	16	45,309	45,248	60	414,495	422,918	(8,424)
<b>Net Earnings (Loss)</b>		<b>(259,989)</b>	<b>(107,092)</b>	<b>(152,897)</b>	<b>(275,474)</b>	<b>(906,413)</b>	<b>630,939</b>
Memo Adjustments -							
- QZAB matching funds	17	-	-	-	-	-	-
- TIF Grant	18	-	-	-	253,750	253,750	-
<b>Net Earnings (Loss) after adjustments</b>		<b>(259,989)</b>	<b>(107,092)</b>	<b>(152,897)</b>	<b>(21,724)</b>	<b>(652,663)</b>	<b>630,939</b>

Career Academy South Bend  
**Balance Sheet**  
June 2014 Through March 2015

	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15
<b>Assets:</b>										
Cash	617,134	520,173	343,241	126,687	(13,816)	175,882	125,164	27,799	175,156	39,580
Petty Cash	100	100	100	100	100	100	100	100	100	100
<b>Total Cash</b>	<b>617,234</b>	<b>520,273</b>	<b>343,341</b>	<b>126,787</b>	<b>(13,716)</b>	<b>175,982</b>	<b>125,264</b>	<b>27,899</b>	<b>175,256</b>	<b>39,680</b>
Accounts Receivable	-	-	-	-	-	-	(26,111)	(26,111)	(26,111)	(26,111)
Prepaid Other	(8,634)	(9,155)	(13,579)	(11,796)	(13,685)	(16,661)	(16,320)	(16,320)	35,447	(10,925)
<b>Total Short Term Assets</b>	<b>608,600</b>	<b>511,118</b>	<b>329,762</b>	<b>114,991</b>	<b>(27,401)</b>	<b>159,321</b>	<b>82,832</b>	<b>(14,533)</b>	<b>184,592</b>	<b>2,644</b>
Property, Plant & Equipment - Net of Depreciation										
Land	159,400	159,400	159,400	159,400	159,400	159,400	159,400	159,400	159,400	159,400
Building	11,516,633	11,516,633	11,537,941	11,582,686	11,591,136	11,612,360	11,671,230	11,743,821	11,743,821	11,743,821
Furniture	568,366	568,366	568,366	568,366	568,366	568,366	568,366	568,366	568,366	568,366
Equipment	514,970	514,970	514,970	527,750	534,688	559,303	562,282	565,347	565,347	572,521
Computer Hardware & Software	331,314	434,934	437,723	449,323	449,323	449,323	449,323	449,323	449,323	457,859
Construction-In-Process	-	-	-	-	-	-	-	21,425	40,389	41,389
PP&E Cost	13,090,684	13,194,304	13,218,401	13,287,526	13,302,914	13,348,753	13,410,602	13,507,683	13,526,647	13,543,357
Less: Accumulated Depreciation	(1,250,504)	(1,300,573)	(1,350,356)	(1,400,562)	(1,445,176)	(1,489,834)	(1,534,948)	(1,574,497)	(1,619,690)	(1,664,999)
<b>Total PP&amp;E - Net</b>	<b>11,840,180</b>	<b>11,893,731</b>	<b>11,868,045</b>	<b>11,886,964</b>	<b>11,857,738</b>	<b>11,858,918</b>	<b>11,875,654</b>	<b>11,933,186</b>	<b>11,906,956</b>	<b>11,878,358</b>
<b>Total Assets</b>	<b>12,448,779</b>	<b>12,404,850</b>	<b>12,197,807</b>	<b>12,001,954</b>	<b>11,830,337</b>	<b>12,018,239</b>	<b>11,958,486</b>	<b>11,918,653</b>	<b>12,091,548</b>	<b>11,881,002</b>
<b>Liabilities:</b>										
Accounts Payable	56,561	56,561	56,561	56,561	56,561	56,561	56,561	56,561	56,561	56,561
Temp Loan - Garatoni Family Foundation	4,722,834	4,726,901	4,603,422	4,607,258	4,661,267	4,739,015	3,743,096	3,811,354	4,139,535	4,193,128
Temp Loan - Larry Garatoni	4,136,202	4,139,762	4,143,325	4,146,776	4,150,345	4,153,802	4,157,377	4,160,955	4,164,190	4,167,774
Employee Deductions - Retirement	2,751	3,138	1,761	1,735	3,111	3,397	3,393	2,113	2,170	(348)
Employee Deductions - Vol Ins & FSA Medical	2,604	2,671	2,570	2,239	2,557	2,549	2,511	3,945	3,974	4,020
Employee Deductions - Other Payment	-	-	(0)	(0)	(0)	(0)	(1)	(0)	(0)	(0)
County Property Tax Accrual	-	-	-	-	-	-	-	-	-	-
Current Portion of Mortgage	62,214	62,590	62,968	63,349	63,731	64,116	64,504	64,893	65,286	65,680
<b>Current Liabilities</b>	<b>8,983,166</b>	<b>8,991,623</b>	<b>8,870,607</b>	<b>8,877,918</b>	<b>8,937,572</b>	<b>9,019,440</b>	<b>8,027,440</b>	<b>8,099,821</b>	<b>8,431,715</b>	<b>8,486,815</b>
United Way restricted grant	-	-	-	-	-	-	-	-	-	-
Long Term Debt - Mortgage	517,983	512,592	507,170	501,714	496,225	490,703	485,148	479,559	473,937	468,280
Public Finance Authority-QZAB Bonds	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000
Common School Loan	-	-	-	-	0	-	-	-	-	-
<b>Total Liabilities</b>	<b>13,501,149</b>	<b>13,504,216</b>	<b>13,377,776</b>	<b>13,379,632</b>	<b>13,433,797</b>	<b>13,510,143</b>	<b>12,512,588</b>	<b>12,579,380</b>	<b>12,905,652</b>	<b>12,955,095</b>
<b>Net Equity</b>	<b>(1,052,370)</b>	<b>(1,099,366)</b>	<b>(1,179,970)</b>	<b>(1,377,677)</b>	<b>(1,603,460)</b>	<b>(1,491,904)</b>	<b>(554,102)</b>	<b>(660,727)</b>	<b>(814,105)</b>	<b>(1,074,094)</b>
<b>Total Liabilities &amp; Equity</b>	<b>12,448,779</b>	<b>12,404,850</b>	<b>12,197,807</b>	<b>12,001,954</b>	<b>11,830,337</b>	<b>12,018,239</b>	<b>11,958,486</b>	<b>11,918,653</b>	<b>12,091,548</b>	<b>11,881,002</b>

Career Academy South Bend  
**Statement of Cash Flows**  
2014 - 2015

<b>Fiscal</b>	<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>YTD</b>
<b>Sources of Funds</b>										
Receipts + / (-) Expenditures	(46,997)	(208,103)	(197,707)	(225,783)	(14,694)	937,802	(106,625)	(153,378)	(259,989)	(275,474)
Restricted Grant/QZAB match	-	127,500	-	-	126,250	-	-	-	-	253,750
<b>Add: Depreciation Expense</b>	<b>50,069</b>	<b>49,783</b>	<b>50,206</b>	<b>44,614</b>	<b>44,659</b>	<b>45,113</b>	<b>39,549</b>	<b>45,194</b>	<b>45,309</b>	<b>414,495</b>
	3,072	(30,821)	(147,501)	(181,169)	156,215	982,915	(67,076)	(108,184)	(214,681)	392,770
<b>Operating Activities</b>										
Accounts Receivable	-	-	-	-	-	26,111	-	-	-	26,111
Prepaid Other	520	4,424	(1,783)	1,889	2,977	(341)	0	(51,767)	46,372	2,291
Accounts Payable	-	-	-	-	-	-	-	-	-	-
Employee Deductions - Ins/Retirement/Other	455	(1,479)	(357)	1,694	278	(43)	155	87	(2,473)	(1,683)
Property Tax Accrual	-	-	-	-	-	-	-	-	-	-
<b>Net Cash Provided/(Used) in Operating Activities</b>	<b>4,047</b>	<b>(27,875)</b>	<b>(149,641)</b>	<b>(177,587)</b>	<b>159,469</b>	<b>1,008,643</b>	<b>(66,921)</b>	<b>(159,864)</b>	<b>(170,782)</b>	<b>419,490</b>
<b>Cash Flow from Investing Activities</b>										
Land	-	-	-	-	-	-	-	-	-	-
Building	-	(21,308)	(44,745)	(8,450)	(21,224)	(58,870)	(72,591)	-	-	(227,188)
Furniture	-	-	-	-	-	-	-	-	-	-
Equipment	-	-	(12,780)	(6,938)	(24,615)	(2,979)	(3,065)	-	(7,174)	(57,551)
Computers	(103,620)	(2,788)	(11,600)	-	-	-	-	-	(8,536)	(126,545)
CIP - Elementary	-	-	-	-	-	-	(21,425)	(18,964)	(1,000)	(41,389)
Proceeds from Asset Dispositions	-	-	-	-	-	-	-	-	-	-
<b>Net Cash Used in Investing Activities</b>	<b>(103,620)</b>	<b>(24,096)</b>	<b>(69,125)</b>	<b>(15,388)</b>	<b>(45,839)</b>	<b>(61,849)</b>	<b>(97,081)</b>	<b>(18,964)</b>	<b>(16,710)</b>	<b>(452,673)</b>
<b>Cash Flow From Financing Activities</b>										
Common School Loan	-	-	-	0	(0)	-	-	-	-	-
Garatoni Family Foundation	4,067	(123,479)	3,836	54,009	77,748	(995,919)	68,258	328,181	53,594	(529,706)
Larry Garatoni	3,560	3,563	3,451	3,569	3,457	3,575	3,578	3,235	3,584	31,572
Public Finance Authority-QZAB Bonds	-	-	-	-	-	-	-	-	-	-
Mortgage	(5,014)	(5,045)	(5,075)	(5,106)	(5,137)	(5,168)	(5,199)	(5,230)	(5,262)	(46,237)
<b>Net Cash Used in Financing Activities</b>	<b>2,612</b>	<b>(124,961)</b>	<b>2,212</b>	<b>52,472</b>	<b>76,068</b>	<b>(997,512)</b>	<b>66,637</b>	<b>326,185</b>	<b>51,916</b>	<b>(544,370)</b>
<b>Net Cash Provided / (Used)</b>	<b>(96,961)</b>	<b>(176,932)</b>	<b>(216,554)</b>	<b>(140,503)</b>	<b>189,698</b>	<b>(50,718)</b>	<b>(97,365)</b>	<b>147,358</b>	<b>(135,576)</b>	<b>(577,554)</b>
<b>Cash @ Beginning of Period</b>	<b>617,234</b>	<b>520,273</b>	<b>343,341</b>	<b>126,787</b>	<b>(13,716)</b>	<b>175,982</b>	<b>125,264</b>	<b>27,899</b>	<b>175,256</b>	<b>617,234</b>
<b>Cash @ End of Period</b>	<b>520,273</b>	<b>343,341</b>	<b>126,787</b>	<b>(13,716)</b>	<b>175,982</b>	<b>125,264</b>	<b>27,899</b>	<b>175,256</b>	<b>39,680</b>	<b>39,680</b>

**Career Academy South Bend  
Loan Activity and Interest Expense**

<b>Loan Description</b>	<b>Loan Balance 7/1/2014</b>	<b>Borrowed</b>	<b>Loan Payments</b>	<b>Accrued Int/ Expense</b>	<b>Converted to Donation</b>	<b>Loan Balance 3/31/2015</b>	<b>Interest Exp Loan Payment</b>
Garatoni Family Foundation	4,722,834	690,000	(253,750)	34,044	(1,000,000)	4,193,128	-
Larry Garatoni	4,136,202	-	-	31,572		4,167,774	-
Public Finance Authority-QZAB Bonds	4,000,000	-	-	-		4,000,000	-
Crescent Michiana Properties	580,197	-	(40,974)	-		539,222	30,442

Totals

<b>13,439,233</b>	<b>690,000</b>	<b>(294,724)</b>	<b>65,616</b>	<b>(1,000,000)</b>	<b>12,900,125</b>	<b>30,442</b>
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memo - total interest expense

96,058
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Career Academy South Bend  
**Monthly Revenue and Expense Summary**  
2014 - 2015

<b>Fiscal</b>		<b>July</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>YTD</b>
<b>Receipts (Revenue):</b>											
Basic grants and other	1	289,879	245,184	268,557	250,935	434,877	412,837	315,405	383,989	321,287	2,922,949
Private donations	2	6,250	300	5,724	-	-	1,000,115	10,000	171	224	1,022,784
Rental income	3	1,300	-	1,300	1,300	1,300	2,600	-	1,300	1,300	10,400
Other misc income	4	3,981	1,079	3,573	1,710	6,886	13,468	4,695	27,470	7,312	70,174
<b>Total Receipts</b>		<b>301,410</b>	<b>246,562</b>	<b>279,154</b>	<b>253,945</b>	<b>443,063</b>	<b>1,429,020</b>	<b>330,100</b>	<b>412,930</b>	<b>330,123</b>	<b>4,026,308</b>
<b>Expenses:</b>											
Employee salaries	5	199,011	208,328	226,427	235,212	251,498	259,432	260,674	326,854	270,060	2,237,497
Employee benefits	6	43,262	46,133	51,906	56,388	45,362	50,424	37,162	87,943	118,175	536,753
Prof/Technical/Training/Other	7	1,674	5,876	6,059	9,821	750	1,393	2,998	3,588	12,360	44,520
Facility and utilities	8	21,093	28,683	26,828	26,121	30,016	35,782	30,921	29,687	59,524	288,654
Professional & Outside Services	9	6,931	53,525	24,813	23,305	32,207	19,695	21,254	32,481	37,218	251,429
Textbooks	10	-	16,429	4,764	11,687	8,355	11,830	3,457	572	-	57,094
Supplies and materials	11	2,462	21,139	55,802	46,271	28,264	48,189	17,999	23,506	17,004	260,636
Advertising	12	10,072	9,361	14,848	10,150	1,842	2,374	8,659	804	15,925	74,034
Other expenses	13	2,701	4,351	4,476	5,166	3,967	5,977	3,896	5,974	4,103	40,611
Interest	14	11,132	11,059	10,732	10,992	10,838	11,008	10,157	9,705	10,436	96,058
<b>Total Expenses</b>		<b>298,338</b>	<b>404,883</b>	<b>426,656</b>	<b>435,114</b>	<b>413,098</b>	<b>446,105</b>	<b>397,175</b>	<b>521,114</b>	<b>544,804</b>	<b>3,887,287</b> <b>3,339,983</b>
<b>Net Earnings Before</b>											
<b>Depreciation and Amortization</b>		<b>3,072</b>	<b>(158,321)</b>	<b>(147,501)</b>	<b>(181,169)</b>	<b>29,965</b>	<b>982,915</b>	<b>(67,076)</b>	<b>(108,184)</b>	<b>(214,681)</b>	<b>139,020</b>
<b>Depreciation and Amortization</b>	16	<b>50,069</b>	<b>49,783</b>	<b>50,206</b>	<b>44,614</b>	<b>44,659</b>	<b>45,113</b>	<b>39,549</b>	<b>45,194</b>	<b>45,309</b>	<b>414,495</b>
<b>Net Earnings</b>		<b>(46,997)</b>	<b>(208,103)</b>	<b>(197,707)</b>	<b>(225,783)</b>	<b>(14,694)</b>	<b>937,802</b>	<b>(106,625)</b>	<b>(153,378)</b>	<b>(259,989)</b>	<b>(275,474)</b>
Memo Adjustments -											
- QZAB matching funds	17	-	-	-	-	-	-	-	-	-	-
- TIF Grant	18	-	127,500	-	-	126,250	-	-	-	-	253,750
<b>Net Earnings after adjustments</b>		<b>(46,997)</b>	<b>(80,603)</b>	<b>(197,707)</b>	<b>(225,783)</b>	<b>111,556</b>	<b>937,802</b>	<b>(106,625)</b>	<b>(153,378)</b>	<b>(259,989)</b>	<b>(21,724)</b>

Career Academy South Bend  
**Revenue and Expense Detail - P&L**  
2014 - 2015

<b>Fiscal</b>		<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>YTD</b>
<b>Receipts (Revenue):</b>											
Private Donation	2	6,250	300	5,724	-	-	1,000,115	10,000	171	224	1,022,784
Basic Grant - Tuition Support	1	217,307	217,307	217,307	217,307	405,313	368,313	273,642	273,642	273,642	2,463,777
Special Education Grant	1	27,877	27,877	27,877	27,877	27,877	27,877	27,877	104,001	37,392	336,532
Special Education - Reimb Part B	1	20,380	-	-	-	-	8,152	-	-	-	28,532
Title I Charter Funds - Reimb	1	24,316	-	23,373	5,752	1,687	8,496	13,886	6,346	10,252	94,108
Summer School Reimbursement	1	-	-	-	-	-	-	-	-	-	-
IN Charter Schools - Grant	1	-	-	-	-	-	-	-	-	-	-
Rental Income, Utility and Labor Allocation	3	1,300	-	1,300	1,300	1,300	2,600	-	1,300	1,300	10,400
Bus Pass - Student Fees - Books	4	1	190	245	659	793	1,252	1,087	681	740	5,648
Other Misc Revenue	4	3,980	889	3,328	1,051	6,094	12,216	3,608	26,788	6,572	64,526
<b>TOTAL RECEIPTS</b>		<b>301,410</b>	<b>246,562</b>	<b>279,154</b>	<b>253,945</b>	<b>443,063</b>	<b>1,429,020</b>	<b>330,100</b>	<b>412,930</b>	<b>330,123</b>	<b>4,026,308</b>
<b>EXPENDITURES:</b>											
<b>Elementary:</b>											
Salaries	5										-
Benefits	6										-
Supplies & Materials	11										-
Textbooks	10										-
Prof/Technical/Training/Other	7										-
Professional & Outside Services	9										-
Other	13										-
Total Elementary		-	-	-	-	-	-	-	-	-	-
<b>Admin / Other</b>											
Salaries	5	-	-	-	-	-	-	-	2,500	6,332	8,832
Advertising / Marketing	12	-	-	-	-	-	-	-	-	14	14
Heating / Cooling / Lights	8	-	-	-	-	-	-	-	-	5,167	5,167
Total Admin / Other		-	-	-	-	-	-	-	2,500	11,513	14,013
<b>Middle School : 5 to 8</b>											
Salaries	5	17,303	45,163	49,971	57,800	54,826	51,962	51,357	67,125	50,547	446,055
Benefits	6	3,483	6,512	5,314	12,203	9,452	7,878	4,041	11,992	20,371	81,246
Supplies & Materials	11	-	1,151	5,004	11,842	6,908	4,085	1,554	5,286	3,685	39,516
Textbooks	10	-	16,086	4,419	7,003	3,599	5,394	2,034	-	-	38,535
Prof/Technical/Training/Other	7	70	-	1,043	636	400	559	365	1,750	1,288	6,110
Professional & Outside Services	9	-	1,034	1,892	2,205	79	725	625	788	-	7,348
Other	13	-	600	1,095	1,603	250	1,343	895	865	630	7,280

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<b>Fiscal</b>		<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>YTD</b>
	Total Jr. High	20,857	70,547	68,738	93,292	75,514	71,946	60,871	87,805	76,520	626,090
<b>Sr. High:</b>											
	Salaries	5 45,509	59,669	67,969	69,009	76,952	76,206	77,040	88,283	77,630	638,265
	Benefits	6 7,367	6,635	10,518	10,448	9,329	11,328	3,144	17,364	31,077	107,210
	Supplies & Materials	11 1,540	12,913	36,216	28,357	8,792	24,055	10,371	6,233	8,986	137,462
	Textbooks	10 -	342	345	4,684	4,756	6,436	1,423	572	-	18,559
	Prof/Technical/Training/Other	7 1,604	4,063	4,839	3,994	350	632	2,613	1,522	10,284	29,900
	Professional & Outside Services	9 -	14,411	3,519	705	79	940	5,319	788	70	25,831
	Other	13 900	600	1,370	1,583	955	2,493	715	255	-	8,870
	<b>Total Sr. High</b>	<b>56,920</b>	<b>98,632</b>	<b>124,775</b>	<b>118,779</b>	<b>101,213</b>	<b>122,090</b>	<b>100,625</b>	<b>115,016</b>	<b>128,047</b>	<b>966,097</b>
<b>Special Education - LD</b>											
	Salaries	5 3,573	22,005	22,906	31,112	28,755	28,462	28,822	37,136	29,332	232,102
	Benefits	6 1,621	2,358	2,477	3,383	(308)	(31)	1,699	3,026	4,124	18,349
	Supplies & Materials	11 -	-	1,642	279	2,201	365	-	1,786	178	6,452
	Prof/Technical/Training/Other	7 -	61	-	-	-	-	-	161	-	222
	Professional & Outside Services	9 71	250	611	6,480	5,760	4,800	6,825	4,011	10,601	39,408
	<b>Total Learning Disability</b>	<b>5,265</b>	<b>24,674</b>	<b>27,637</b>	<b>41,254</b>	<b>36,407</b>	<b>33,596</b>	<b>37,346</b>	<b>46,120</b>	<b>44,235</b>	<b>296,532</b>
<b>Support Services - Social Svcs / Nurse / Other</b>											
	Salaries	5 8,265	9,210	7,191	8,580	7,381	7,845	12,084	12,345	6,891	79,794
	Benefits	6 1,697	1,748	1,720	1,461	1,203	1,375	(233)	1,892	3,413	14,275
	Supplies & Materials	11 -	-	2,290	502	145	205	-	536	537	4,215
	Prof/Technical/Training/Other	7 -	1,016	-	5,097	-	74	-	-	420	6,607
	<b>Total Support Services</b>	<b>9,963</b>	<b>11,973</b>	<b>11,201</b>	<b>15,640</b>	<b>8,729</b>	<b>9,500</b>	<b>11,851</b>	<b>14,773</b>	<b>11,261</b>	<b>104,892</b>
<b>Title 1</b>											
	Salaries	5 16,348	4,306	2,221	2,221	7,502	8,680	7,914	8,068	7,039	64,298
	Benefits	6 3,382	1,025	697	613	994	1,042	1,191	2,172	2,895	14,011
	Supplies & Materials	11 -	-	750	-	-	-	-	-	-	750
	Prof/Technical/Training/Other	7 -	-	-	-	-	-	-	-	-	-
	<b>Total Title 1</b>	<b>19,730</b>	<b>5,331</b>	<b>3,667</b>	<b>2,834</b>	<b>8,496</b>	<b>9,721</b>	<b>9,106</b>	<b>10,240</b>	<b>9,934</b>	<b>79,059</b>
<b>Admin / Other</b>											
	Salaries	5 108,013	67,976	76,169	66,490	76,082	86,278	83,457	111,397	92,290	768,151
	Benefits	6 12,309	11,320	12,535	10,206	6,474	9,853	3,844	21,709	34,610	122,858
	Unemployment/SS/Medicare	6 13,402	16,535	18,646	18,074	18,218	18,979	23,475	29,789	21,685	178,804
	Advertising / Marketing	12 10,072	9,361	14,848	10,150	1,842	2,374	8,659	804	15,911	74,019



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<b>Fiscal</b>		<b>Jul</b>	<b>Aug</b>	<b>Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>YTD</b>
Outside Prof Services	9	3,509	32,176	18,791	13,917	20,635	13,230	8,485	21,242	26,547	158,532
Insurance - School Gen Lia & WC	9	3,351	5,653	-	-	5,653	-	-	5,653	-	20,311
Professional Development	7	-	-	-	-	-	-	-	-	-	-
Telephone	13	1,801	1,949	1,988	1,957	2,738	2,118	2,094	4,331	2,588	21,563
Travel	7	-	737	177	95	-	128	20	156	369	1,681
Supplies and Materials	11	922	7,075	9,901	5,290	10,218	19,479	6,074	9,665	3,617	72,241
Water & Sewer	8	765	432	745	608	967	608	588	499	654	5,866
Building Cleaning, Maint., Trash Removal	8	13,511	21,306	16,290	15,603	20,603	19,955	18,739	15,491	41,000	182,498
Heating / Cooling / Lights	8	6,552	6,035	6,529	8,437	7,734	9,589	10,554	9,758	11,841	77,029
Rental - Carpet Runners and Printers	8	265	909	3,264	1,473	713	5,631	1,039	3,939	862	18,095
Other	13	-	1,202	24	24	24	24	191	523	886	2,898
<b>Total Admin / Other</b>		<b>174,472</b>	<b>182,666</b>	<b>179,906</b>	<b>152,323</b>	<b>171,902</b>	<b>188,243</b>	<b>167,220</b>	<b>234,956</b>	<b>252,859</b>	<b>1,704,547</b>
<b>Building Depre / Equipment / Loans</b>											
Equipment Purchases	13	-	-	-	-	-	-	-	-	-	-
Depreciation Expense	16	50,069	49,783	50,206	44,614	44,659	45,113	39,549	45,194	45,309	414,495
Loan Interest	14	11,132	11,059	10,732	10,992	10,838	11,008	10,157	9,705	10,436	96,058
Other	13	-	-	-	-	-	-	-	-	-	-
<b>Total Building Depre / Equip / Loans</b>		<b>61,201</b>	<b>60,842</b>	<b>60,938</b>	<b>55,606</b>	<b>55,497</b>	<b>56,121</b>	<b>49,706</b>	<b>54,899</b>	<b>55,744</b>	<b>510,553</b>
<b>Total Expenditures</b>		<b>348,407</b>	<b>454,666</b>	<b>476,862</b>	<b>479,728</b>	<b>457,757</b>	<b>491,218</b>	<b>436,725</b>	<b>566,308</b>	<b>590,112</b>	<b>4,301,782</b>
<b>Net Earnings</b>		<b>(46,997)</b>	<b>(208,103)</b>	<b>(197,707)</b>	<b>(225,783)</b>	<b>(14,694)</b>	<b>937,802</b>	<b>(106,625)</b>	<b>(153,378)</b>	<b>(259,989)</b>	<b>(275,474)</b>
Memo Adjustments -											
- Matching QZAB funds	17	-	-	-	-	-	-	-	-	-	-
- TIF Grant	18	-	127,500	-	-	126,250	-	-	-	-	253,750
<b>Net Earnings after adjustments</b>		<b>(46,997)</b>	<b>(80,603)</b>	<b>(197,707)</b>	<b>(225,783)</b>	<b>111,556</b>	<b>937,802</b>	<b>(106,625)</b>	<b>(153,378)</b>	<b>(259,989)</b>	<b>(21,724)</b>

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 23: Financial Reports For Organization

Since the applicant has operated only one school, CASB, what is requested for this attachment (financial statements for organization as a whole) is the same as for Attachment 22 (financial reports for the organization's Indiana schools).

Career Academy of South Bend Application to Education One, LLC (Trine University)  
Application for Success Academy of South Bend

Attachment 24: Summary of Current or Past Litigation

1. Indiana Department of Education, Division of Special Education No. HR-035-2015
  - a. Demand: request for due process hearing filed February 5, 2015 by parent of CASB student asserting that the school failed to meet the student's special education needs by (i) giving insufficient consideration to evaluations of the student prepared prior to the student's enrollment at the school in August, 2014; (ii) failing to provide speech therapy services and special education services for classes other than Algebra; (iii) proposing an IEP which did not take into account the full scope of the student's disabilities.
  - b. Response: the school agreed to convene a new case conference and develop a new IEP for the student providing for (i) special education accommodations in all courses; (ii) daily consultation between the student and his Teacher of Record; (iii) speech therapy services; (iv) reading services utilizing the Orton-Gillingham program or an alternative if use of the OG program is not helpful.
  - c. Result: the parties entered into a settlement agreement 3/20/2015 and the petition was dismissed.
2. IDOE Office of Special Education Complaint CP-041-2015/Mediation MD-023-2015
  - a. Demand: 3/17/2015 objection to expulsion of student for behavioral issues.
  - b. Response: the behavior which was the basis for expulsion was not a manifestation of the student's disability and expulsion was proper, but the school acknowledges the student should receive homebound instruction until readmitted in Fall of 2015.
  - c. Result: the parties entered into a mediation agreement 3/25/2015 providing for the student to receive homebound services. The student's IEP was not changed.
3. IDOE Office of Special Education Mediation MD 042-2015
  - a. Demand: parent objection to half-day scheduling for son and objection to him being sent home for behavior. Parent states son does no work at all at school and refuses to do any written work but he learns from listening and enjoys socialization.
  - b. Response: behavioral problems cannot be consequence-free but the student will be scheduled full-day and a case conference will be convened to modify the student's behavior plan and discuss accommodations.
  - c. Result: the parties entered into a mediation agreement 3/25/2015
4. IDOE Office of Special Education Complaint CP-091-2015
  - a. Demand: parent (same as #3 above) objection 5/1/2015 to son being suspended for use of F-word to teacher, which parent states was in response to teacher telling an inappropriate story and was a manifestation of his disability.
  - b. Response: the teacher did not tell inappropriate story as alleged but school agrees to remove three-day suspension from student's record. School agrees all the student's teachers to receive briefing from student's teacher of record on student's IEP and Behavior Intervention Plan plus background on Autism Spectrum Disorder and social interactions.
  - c. Result: parties entered agreement 5/11/2015 resolving complaint.