

PROPOSAL TO CHARTER

Xavier School of Excellence **South Bend, Indiana**

Submitted to:
Ball State University, Office of Charter Schools

Submitted by:
Indiana Schools of Excellence
March 27, 2008

General Information Sheet

Name of Proposed School: Xavier School of Excellence

Organizer: Indiana Schools of Excellence Foundation, Inc.

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Brief Description of Proposed School (for media distribution): XSE provides its students with a strong academic curriculum (the building blocks) and broad cultural diverse experiences in a supportive, innovative, and challenging environment that fosters academic success, good citizenship, global awareness, and creates life long learners.

Address of Proposed School: TBD

Local School Corporation where charter school will be located: SB Community School Corporation

Date School Plans to Begin Operation: August 17, 2009

Date School Plans to Have Students in Attendance: August 24, 2009

If the services of an Educational Management Organization (EMO) will be used, indicate which

EMO: American Quality Schools

Have you /will you the organizing group file a proposal to charter this school with other sponsors?

Y or N: No

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Executive Summary

The mission of Xavier School of Excellence (XSE) is to provide its students with a strong academic curriculum (the building blocks) and broad cultural experiences in a supportive, innovative, and challenging environment that fosters academic success, good citizenship, and create life long learners.

We believe that by combining a strong accountable academic environment and the core values such as honesty, respect, trust and responsibility, Xavier will shape and develop academically, socially, and emotionally responsible individuals that will positively and conscientiously influence the world around them.

The organizing group is the Indiana Schools of Excellence Foundation, Inc. This not-for-profit foundation has recently been formed to bring high quality school choice in to the South Bend community. The group consists of conscientious parents, professionals, and entrepreneurs within the South Bend community that are dedicated to impacting school age students and St. Joseph County on an educational level by providing school choice.

We believe that by combining a strong accountable academic environment and the core values such as honesty, respect, trust, and responsibility, Xavier will shape and develop academically, socially, and emotionally responsible individuals that will positively and conscientiously influence the world around them.

The Xavier School of Excellence was founded on the basis of a large community population vocalizing the need for alternative choice options in education that will bridge the gap between the public and private school sectors. Although there are several private school options, they are often not affordable for majority of the incomes that reside in the SBCS. Xavier School of Excellence's mission will strive to fill that gap and steadily grow in the problem areas currently facing the SBCSC.

XSE will offer a unique blend of strong basic education, technology integration, foreign language component, and community and global involvement. Parents will pledge to be involved in the educational process. Through its active board and its parent volunteer, XSE will active engage the local universities, businesses, and non-for-profits to expand the students' horizons beyond the classroom.

XSE has the following goals:

1. To provide each student with a challenging academic experience that will become the foundation for future academic success and shape each student into a life-long learner.
2. To develop a student's conversational mastery of a world language to prepare them to be a global citizen.
3. To provide each student with a supportive, innovative, and challenging environment that develops character, fosters good citizenship, and cultivates individual interests.
4. To create active involvement by all stakeholders by maintaining strong communication with and between students, parents, staff, administration, board, community, and government.

The Indiana Schools of Excellence Foundation through its education management organization will utilize a proven educational model as demonstrated in the operation of their seven highly successful elementary schools. This model has achieved dramatic success in a short period of time in raising students' academic achievement. The model consists of:

1. Core Knowledge Curriculum is a nationally developed and widely used curriculum as the instructional program. The curriculum is a research-based sequence of information that prepares children to be knowledgeable and critical thinking individuals. Standardized test scores of at-risk students using the approach demonstrates that students, when properly challenged, are fully capable of meeting the challenge.
2. SRA's Open Court is a "research based" reading program designed to teach reading and writing simultaneously.
3. Saxon Math is an approach focuses on incremental development and continual practice and review. Incremental development is the introduction of topics in easily understandable pieces (increments), permitting the assimilation of one facet of a concept before the next facet is introduced. Both facets are then practiced together.
4. Character Education - The Indiana Schools Foundation recognizes that the ethical and moral development of our students is a critical and essential part of its mission and is an integral and part of each child's education. Character Education will not be taught as a separate class in the early grades, but will permeate the classrooms and affect the entire school culture. The values such as honesty, respect, trust, and responsibility, and how they can best be taught will become a continual part of the weekly professional development curriculum for teachers.
5. Career Awareness - This component of our curriculum is directed towards educating students about career awareness. Many students from the South Bend community have had limited opportunities to experience or have knowledge of various career options. Few have role models in the professions to whom they can relate. Through a structured career awareness program beginning in kindergarten, our school will look at the essence of a variety of career paths to which our students might aspire. Through study, guest lectures, video, simulations, and field trips we will expose our students to avenues of professional leadership they may not have dreamed possible.

We are confident that Xavier School of Excellence will achieve in the second year of operation a minimum of a 5% gain on the base line ISTEP, administered the first year of operation. Our goal for subsequent years would be a 3% -6% yearly increase on the ISTEP. The school will meet AYP targets set by IDOE each year it is eligible. In addition, the Xavier School of Excellence will attain a minimum of 50% of the students reaching their target growth on NWEA after the first year of operation. We expect that subsequent years should see an increase of between 3% - 5% per year of students reaching their targets.

Our plan calls for the Xavier School of Excellence to begin with two sections of 25 students per section in each of grades K-5. Thus, the school would open with a total enrollment of 300 students. The second year, with the addition of grade 6, enrollment will increase to 350 students; by the fourth year, the school's total capacity will be 450 students.

The school will expect all students to conduct themselves in a socially responsible manner. Disciplinary measures will be used to maintain a safe and orderly school environment, which promotes the school's philosophy of providing a college preparatory education for all students.

Teachers and students will have three avenues to integrate technology into the curriculum. First, every classroom will be equipped with not only a computer for the teacher, but also a number of student computers to facilitate the educational process. Second, there will be a dedicated computer lab classroom which will provide students with the resources to acquire the necessary skills to achieve mastery as well as to equip them with the quintessential research skills. Lastly, computers on wheels (COW) will be available to all classrooms to support, analyze, and assimilate topics and ideas derived from the curriculum.

The support and involvement of parents is essential. Therefore, a Parent Advisory Council will be established and will meet on a regular monthly basis with the principal and other key administrators. The purpose of the group is to offer input into school activities and policies and to review information about the school. In addition, one member selected from the Parent Advisory Council will be appointed to the School Board as the parent representative, ensuring that institutional decisions reflect parental input. Also, parents will be able to monitor their child's schoolwork real time through PowerSchool, a web-based interactive grade book. Parents and other interested parties will also be able to track the school's overall educational progress by visiting the school's web site. Lastly, we will ensure that extra-curricular activities and parent/teacher conferences will be scheduled at times that are convenient for parents, and that the school has a "parent-friendly" climate that welcomes parents to become part of their child's education.

By providing a holistic approach to education through a strong academic curriculum, character development, and community involvement, we seek to develop a well-rounded citizen. The business community in particular will play a major role in the XSE curriculum. The XSE will actively incorporate local businesses by seeking out real-life examples of how good character is essential to all aspects of success, resulting in the support of the community at large.

Although XSE is not currently being advertised, it will recruit and educate the community in regards to its mission through information brochures sent to targeted households, television and radio promotional advertisements and various informational meetings scheduled throughout the SBCSC.

Positive growth in our schools reflects positive growth in our community thereby creating more viable options for business development and increasing the viability of the community as a whole. This is our vision for the Xavier School of Excellence.

Defining Statements for the Proposed School

Section A - Mission

Provide a mission statement for the school. Explain the need for the school in terms of the community and the target student population the school is intended to serve. Provide five recent letters of support for the proposed school. An organization's mission statement should communicate the essence of the school..

The mission of Xavier School of Excellence (XSE) is to provide its students with a strong academic curriculum (the building blocks) and broad cultural experiences in a supportive, innovative, and challenging environment that fosters academic success, good citizenship, and create life long learners.

We believe that by combining a strong accountable academic environment and the core values such as honesty, respect, trust and responsibility, Xavier will shape and develop academically, socially, and emotionally responsible individuals that will positively and conscientiously influence the world around them.

The South Bend community needs a school in which each child is given a collectively supportive opportunity to achieve his or her greatest potential; one in which the “whole child” is educated not only academically, but socially and emotionally as well. We believe in a system that has no educational limits, because every child is capable of learning when provided with the proper instructional tools in an environment where teachers target instruction at development and academically appropriate levels. By combing a strong academic environment and implementing Core Values such as honesty, respect, trustworthiness and responsibility, Xavier will shape students into critical thinkers who make sound personal and academic choices that create a standard of education that will challenge our educational community and virtually eliminate the drop-out rate, low-ISTEP scores, and educational cracks in the system that currently plague the South Bend Community at large.

The businesses in South Bend and surrounding areas are experiencing increased pressures to expand internationally. Xavier will help to provide insight to the students on the world around them through the introduction of a second language, and to be able to think and critically understand global issues and how they impact their community. This effort will create a positive experience for the child, and allow the child to be able to compete both nationally and internationally.

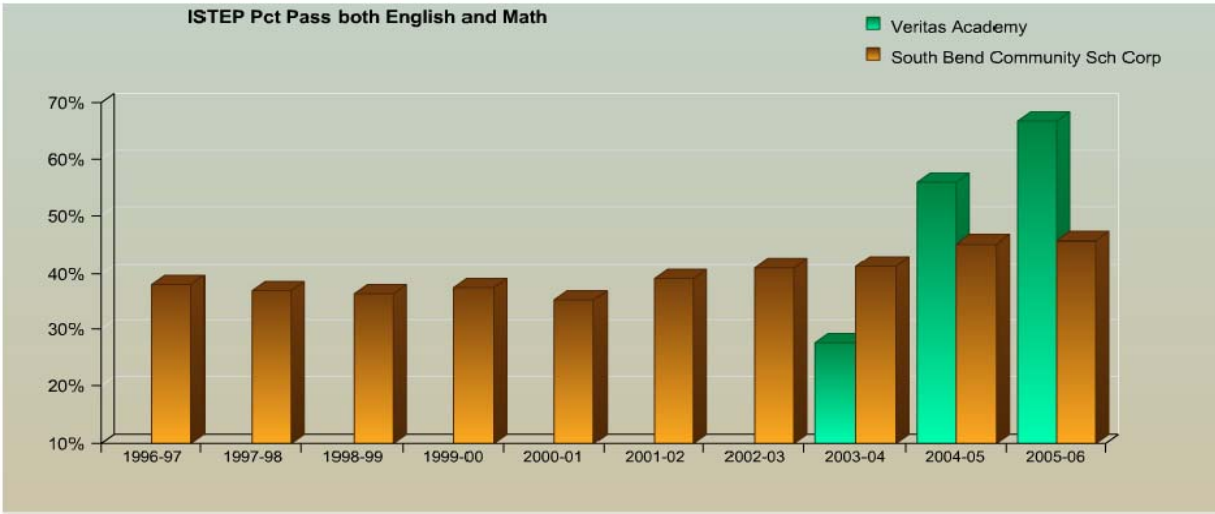
Other areas that students need in the community are bringing the basic math, science, technology, and critical thinking skills. These basic skill-sets are needed to allow the children to grow to become productive adults. By having the skill-set early, the choices of a career become vast for them. This also provides opportunities for local businesses, to get involved by helping the children learn how businesses are run and how the basis (Math, science, etc) is used in everyday life

It is our belief by bringing the interaction of families, schools, students, and businesses, and other community partnerships, we can help to affect change in South Bend and the surrounding cities. That providing a strong school option would be an attraction to draw families to the area, to help ensure that South Bend remains a vibrant city.

To accomplish our mission, we seek to create a school culture that includes:

1. The selection of an administration and teaching staff that truly believes that all students can learn and succeed and do not accept things such as gender, ethnicity, race, or poverty as excuses for student failure, but as an opportunity to creatively teach in alternative, relevant methods conducive to reaching each child on a personal level.
2. A respect for students that gives them responsibility along with respect for authority, themselves and the world around them.
3. An interest in every individual student that naturally, logically and consequentially encourages and rewards their success and behaviors.
4. Celebrations of academic achievement through assemblies, honors, ceremonies and publicity so that students can come to believe that academic success is good and is respected and admired by all students.
5. The creation of various extracurricular clubs and activities, such as drama, debate, student newspaper, etc., as well as athletics, to give students a sense of community and an opportunity to potentially find their niche and develop their interests at every level.
6. A desire by all students to come to school and succeed, and therefore they internalize the belief that they can succeed in whatever path they choose no matter what their race, gender, creed or limitations may be.
7. A belief that our school some day will be recognized by the teachers, students and community as one of the best in the state of Indiana.

Of the twenty schools in the South Bend Community School Corporation that serve Grades K-8, three are currently on probation, and twelve are on watch status as per NCLB criteria. Traditional public education in South Bend does not thoroughly prepare students for leadership in society, does not require deep parental engagement, and allows too many students to “fall through the cracks,” as demonstrated by standardized testing see Figure 1.



Line Graph Bar Graph

Year	ISTEP Pct Pass both English and Math
2005-06	South Bend Community Sch Corp 45.5% Veritas Academy 66.7%
2004-05	South Bend Community Sch Corp 45.2% Veritas Academy 55.8%
2003-04	South Bend Community Sch Corp 41.4% Veritas Academy 27.8%

Figure 1: South Bend Stats

To determine whether another charter school is needed in the South Bend area, an informal survey of approximately 50 South Bend residents was conducted. Each participant was asked “Do you believe South Bend needs more school choice?” The results were nearly unanimous that more school choice was needed for parents and students of the South Bend area.

See Attachment K for letters of support from the South Bend Community.

List the overall academic and non-academic goals the school will accomplish during its initial five years of operation. The goals must be measurable. In the section of the Defining Statements headed “Increasing Student Achievement,” list specific measures the proposed school will use for ensuring that student achievement will increase each year that a student is enrolled.

XSE will offer a unique blend of strong basic education, technology integration, a foreign language component, and community and global involvement. Parents will pledge to be involved in the educational process. Through its active board and parent volunteers, XSE will actively engage the local universities, businesses, and not-for-profits to expand the students’ horizons beyond the classroom.

XSE has the following goals:

- To provide each student with a challenging academic experience that will become the foundation for future academic success and shapes each student into a lifelong learner.
- To develop a student's conversational mastery of a world language to prepare them to be a global citizen.
- To provide each student with a supportive, innovative, and challenging environment that develops character, fosters good citizenship, and cultivates individual interests.
- To create active involvement by all stakeholders by maintaining strong communication with and between students, parents, staff, administration, board, community, and government.

Academic Goals

We are confident that Xavier School of Excellence will achieve in the second year of operation a minimum of a 5% gain on the base line ISTEP, administered the first year of operation. Our goal for subsequent years would be a 3% -6% yearly increase on the ISTEP. The school will meet AYP targets set by IDOE each year it is eligible. In addition, The Xavier School of Excellence will attain a minimum of 50% of the students reaching their target growth on NWEA after the first year of operation. We expect that subsequent years should see an increase of between 3% - 5% per year of students reaching their targets.

For those students who come to XSE significantly below grade level academically, we will strive to improve their academic performance by two grade levels for every year they are in attendance at XSE until they are at grade level standards.

Operational Goals

During the School's initial years of operation, the School will strive to achieve the following operational goals,

1. The School will have a 95% average daily attendance rate.
2. The School will have a 90% year-to-year student retention rate.
3. The School will have a 90% year-to-year teacher retention rate.
4. The School will achieve a 90% positive-approval rating on the AQS Customer Satisfaction Survey of Students, Parents, and Teachers.
5. A reduction in the discipline referrals to the Dean of Students as reflected in the discipline accountability record from year to year over the 5 year period because of success with a school wide positive behavior system.

If the school currently exists and is applying to convert to a charter school, explain how the community and student population will benefit from the conversion. Present evidence of the success of the school by submitting test data, enrollment data and financial information on the school since its initiation.

This section does not apply to XSE

Section B - Solid Governance Structure

Describe the organizing group and explain how this group is qualified to serve as the Organizer for this school. Describe the primary purpose of the Organizer aside from its relationship with this school. If the Organizer is affiliated with other schools or educational programs, list each program and school (may be in an attachment).

The organizing group is the Indiana Schools of Excellence Foundation, Inc. This not-for-profit foundation has been formed to bring high-quality school choice to the South Bend community. The group consists of nine conscientious parents, professionals, and entrepreneurs within the South Bend community that are dedicated to impacting school age students and St. Joseph County on an educational level by providing school choice. The foundation looks to expand the board over time as the need for new expertise or geographic representation is identified.

Describe the role the Organizer will play in the on-going operations of this school. List the specific responsibilities the Organizer will have in the on-going operations of the school. If the Organizer will be an Educational Management Organization (EMO) for the school, so indicate.

Include as attachments the following documents:

A copy of the Articles of Incorporation of the Organizer.

A copy of the By-laws of the Organizer.

The Certification of Incorporation issued by the State of Indiana for the Organizer.

Verification the Organizer has obtained or has formally applied for not-for-profit status.

The ISE will oversee the creation and the development of the Xavier School of Excellence. Specific responsibility will include:

- Acquire and maintain facilities
- Apply for grants and spearhead other fundraising activities
- Ensure compliance with BSU OCS and other regulatory agencies.
- Cultivate business, community, and political relationships.
- Oversee financial accountability and financial controls.
- Actively participate in the XSE School Board, and will have a minority vote.

Articles of Incorporations, Filing Certificate, and corporate by-laws are in Attachment J. In addition December 2007, ISE submitted an application to the IRS for recognition as a 501 (c) 3.

Verify in the Articles of Incorporation that the Organizer and Board of Directors will meet these requirements related to the termination or dissolution of any charter granted in response to this proposal:

- a. *If the University revokes the 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*

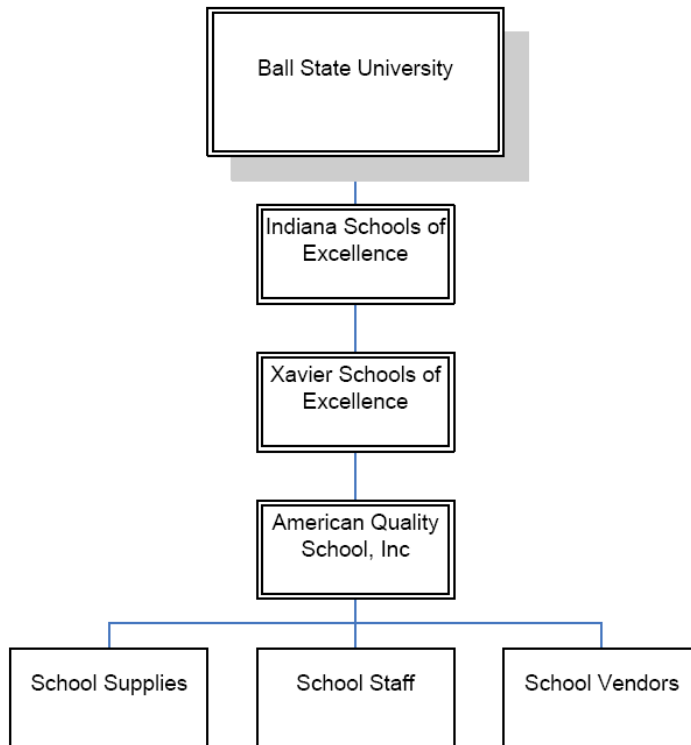
concerning distribution of local or state funds that remain to be distributed to the charter school shall apply.

- b. If the Organizer is dissolved, the consistent with Indiana Code 20-24-3-3, all remaining funds and assets shall be distributed as follows:
 - 1. All remaining funds received from the Department of Education shall be returned to the Department of Education not more than thirty (30) days after dissolution; and*
 - 2. All other remaining assets of the Organizer and the Charter School shall be used for non-profit educational purposes**

Included in Attachment J is a written opinion from our attorney that ISE meets the above requirements.

Include an organizational chart that shows the relationship between all parties directly involved in the development and on-going operation of the school.

Figure 2: Organizational Structure for Xavier School of Excellence



In an attachment, list members of each board who are expected to be involved in the development (Organizer) and on-going operation (Board) of the school. List their town and state of residence.

See Attachment F for bios and resume of Indiana Schools of Excellence Foundation board members.

Yolanda Turner-Smith (South Bend) - Ms. Yolanda Turner-Smith is a Mechanical Engineer in the aerospace industry, working for a large international multi-disciplinary company. She has served on the Veritas Academy (a local charter school) Board of Trustees for four years. Prior to that, she served on the Veritas Academy Advisory Board. Ms. Turner-Smith was the first Vice-President of the Veritas Academy Parent Teacher Organization (VAPTO). Later she served as the Treasurer of VAPTO before her election to the Veritas Academy Advisory Board. Mrs. Turner-Smith is a parent with three children, with two still attending Veritas Academy. Her children also attended the school before a charter was granted. She is very active in the community, participating in the following organizations:

- Indiana Black Expo - South Bend Chapter - Ad Book Chair (3 years) for the Juneteenth Committee.
- National Society of Black Engineers - Performs many math and science initiatives within her region.
- Society of Women Engineers.
- American Society of Mechanical Engineers.
- Minister at River of Life Church of Michiana.
- She is also an entrepreneur, owning Turner Enterprises.

Larry Cardenas (South Bend) - Mr. Cardenas is a lifelong native of South Bend and an Indiana University graduate. He has a long history of successful sales and currently works for the area's largest distributor of mechanical, commercial and residential supplies. Mr. Cardenas has received many awards for sales and other accomplishments, his most recent being a Leadership Award presented by Virginia Polytechnic Institute and State University's Pamplin College of Business. Mr. Cardenas has overcome tough economic and social conditions, and intimately understands the value of education. He had two children enrolled at Veritas Academy, a local charter school. Mr. Cardenas served on the Veritas Academy Board for little over two years. In his effort to ensure the success of Veritas he has served on the Board in various capacities. Some of his roles were Vice President and Chair of the Personnel Committee.

Mr. Richard Allen Jr. (South Bend)- is the Multi-media Production Manager at the College Football Hall of Fame. He has been dedicated to making a difference in children in the community and has been a direct caregiver for mentally and physically abused youth spanning the ages of 11-17.

Attorney Kelly Baer (North Liberty) - Attorney Kelly Baer is local entrepreneur in Family Law. Her practice was founded on the premise that low income individuals should be able to receive quality representation. She has currently has two sons that attend The Crossings Alternative school and has advocated for school choice in the South Bend Community for years.

Mr. Kevin Davis Sr (South Bend).- As local entrepreneur and retiree, Mr. Davis has worked creatively with at risk youth for the past 20 years, mentoring them through his family business, church and the community to expose them to opportunities that would otherwise not be available.

Mrs. Rhonda L. Davis (South Bend)- As an entrepreneur and community mentor, she has worked as an advocate for the past four years specializing in the re-entry of at-risk youth back into the community. She has witnessed the impact of education on these children and currently serves to assist in filling in the educational life-skills gap by assisting the children in creating sustainability plans that disseminate barriers to employment.

Mr. Isaac Hunt (South Bend) - A supervisor at Hyro Inc., has dedicated the majority of his personal time to his position as Deacon and mentor at the River of Life Church. Mr. Hunt is the overseer of Children's Ministry and is dedicating to implementing programs that impact children positively through education and creativity.

Kim and John Keen (North Liberty) – They are local parents who are active in the South Bend community. They have experience as parent of students who attended Veritas Academy in South Bend. Both parents worked closely with the parent cooperative, and working to get other parents engaged in the school.

Pastor Charles Jamerson (South Bend) - is the Associate Pastor for River of Life Church which services one of the largest inner-city congregations in South Bend. Pastor Charles is responsible for overseeing all auxiliary outreach services including the youth; children's and prison ministries which he feels are directly impacted by the quality of education in our community. He has been in outreach ministries for over ten years.

Mrs. Gwendolyn M. Knowlton (South Bend) - As local private contractor, motivational speaker and social worker, she has worked in children's advocacy and education for the past fifteen years. She is a licensed Employment Consultant, Parent Educator through Parents As Children, former home school parent and youth mentor.

Describe the authority and responsibilities of each board. List the general qualifications of each board member that explain why he/she was selected and how those qualifications will contribute to the success of the school. Describe how board members offer diverse skills that will increase capacity to develop and sustain a high quality school - i.e., representatives from education, management, finance, law, etc.

The Xavier Schools of Excellence School Board will be created by ISE. This board will have five to nine members appointed by the foundation. The composition of the board will strive to be the following:

- One member from a local University. This board member will represent the educational community
- Members from the South Bend Chamber of Commerce or equivalent business organization, which will represent the business community.

- One parent of an enrolled child. Unlike other board members, this individual will be selected by the school's Parent Advisory Council.
- Members from a community organization(s).
- Three members from the Indiana Schools of Excellence Foundation

Both the foundation board and the school board will develop policies and make decisions about the school. The school board will operate on behalf of the foundation; however, final authority will rest with the foundation board for all school decisions as the holder of the charter from BSU. The XSE school board will be responsible for the day to day operations of the school specifically the oversight of the selected EMO, AQS. The division of responsibilities between the foundation and the school board will be clearly defined.

All board members will be subject to a criminal history background check.

Describe how the governing board will maintain a meaningful mechanism to ensure local and community participation in the governance of the school.

The support and involvement of parents with the Xavier School of Excellence is essential. Therefore, a Business/Community Advisory Council will be established and will meet on a regular basis with the principal and other key administrators. The purpose of the group is to offer input into school activities and policies and to review information about the school. In addition, at least one member selected from the Business/Community Advisory Council will be appointed to the Xavier School of Excellence school board as the business/community representative, ensuring that institutional decisions reflect community input.

Verify that the Organizer's governing body (or the governing body of a subsidiary or division of the Organizer to which the Organizer has delegated authority and responsibility for operation of the Charter School) will maintain offices in the state of Indiana.

Indiana Schools of Excellence Foundation will maintain an office at the school.

Verify that all records of the proposed school will be made available to the University for inspection and copying upon its request in the offices of the Organizer in the state of Indiana.

All records of the Xavier School of Excellence will be made available to the University for inspection and copying upon its request in the office of ISE.

Provide the name of the Organizer's legal counsel and contact information. Include the business address and business phone number.

Ms. Kelly Baer
 108 N. Main Street
 Suite 805
 South Bend, IN 46601
 574-288-7820

Section C - Administrative Management

Describe how the school will be managed on a day-to-day basis.

The daily management of the Xavier School of Excellence will be the responsibility of the principal. Through a contracted agreement with a not-for-profit educational management organization, American Quality Schools Corporation (AQS), all staff will have a reporting relationship to the principal of the school who, in turn, reports to the President of American Quality Schools; as such, all school staff will be employees of AQS. AQS will have the responsibility of hiring the principal with final approval from Indiana Schools of Excellence. AQS, in consultation with the XSE School Board when needed, will have the responsibility of hiring the teaching and support staffs.

The administrative offices of the school will be located within the school building itself.

List each administrative position for the first two years of school operations. List the qualifications for each administrative staff position. Identify the employer of each administrative employee.

The School will employ the following staff positions:

1. Principal — Indiana Certified Administrator
2. Dean of Students – Indiana Certified Administrator
3. Team Leaders (2) — Indiana Licensed Teachers
4. Teaching Staff— Indiana Licensed Teachers
5. Teachers Aides (as needed)
6. Special Education Teacher(s) – As needed
7. Secretarial Support Staff
8. Social Worker
9. School Librarian
10. School Nurse
11. Security Person
12. School Maintenance Staff

All of the above positions are full-time appointments who are employees of American Quality Schools. See Attachment K for complete job descriptions with position qualifications.

Complete years 1-5 of the Staffing Matrix showing each position (Attachment C).

In Attachment C, the Staffing Matrix for Years 1-5 is included.

In an attachment, describe the program of health insurance, retirement benefits, liability insurance and other benefits the school will provide its teachers and other staff. List the cost of these benefits in the Budget Worksheets.

In Attachment L, is the AQS Employee Handbook that presents the health insurance, retirement benefits, liability insurance, and other benefits the school will provide its teachers and other staff. The costs of these benefits are also included in the Budget Worksheets.

Describe how the school will continuously retain high-quality staff.

The retention of good teachers is a key element in creating a positive school culture and fostering student academic growth. National surveys reveal that teacher turnover and exiting from the profession are serious issues.

The AQS approach to retaining high quality staff is composed of a number of key elements:

- 1) Provide on-going mentoring support for new teachers. AQS professionals with the title of Team Leaders work constantly with new teachers by helping them with material selection, teaching strategies, planning, and classroom management.
- 2) All teachers are provided with a full range of educational materials and educational technology so as to teach effectively. There are no educational material shortages in AQS schools. In addition, every teacher is given a monetary stipend for classroom supplies and material.
- 3) Teachers are given continuous feedback from Team Leaders and administrators on their teaching effectiveness.
- 4) Teachers participate in decision making through a committee structure which deals with various issues and makes recommendations to the administration.
- 5) A faculty advisory council meets three times each year with the President of AQS.
- 6) Teachers are given assistance with tuition for graduate work.
- 7) Teachers work in a performance-based system so that high quality teaching is rewarded by larger salary raises as well as financial bonuses.
- 8) Teachers are encouraged to attend seminars, conferences, and workshops to enhance their professional expertise. AQS covers the entire expense of these meetings.

The key element in all the above initiatives is that AQS attempts to respect teachers as professionals, views them as partners in the education of children along with administrators and parents, and rewards and recognizes them for their excellence in teaching.

Section D - Contracting with an Educational Management Organization (EMO)

If the school intends to enter into a contract with an Education Management Organization (EMO), state the name of that organization, the location of its corporate office, and information about the Education Management Organization's (EMO's) primary contact. An Education Management Organization (EMO) is an organization contracted to provide significant administrative management, financial management, and/or curriculum/instructional services.

ISE has entered into an agreement with the American Quality Schools Corporation (AQS). American Quality Schools is a not-for-profit educational management organization. It was founded by Dr. Michael J. Bakalis who serves as President and CEO of the organization, and is the EMO's primary contact.

Describe the selection process used to identify the Education Management Organization (EMO), and state the reason(s) the Education Management Organization (EMO) was selected over other possible organizations.

In consultation with a Ball State Field Representative, several Education Management Organizations were identified. After preliminary investigation, we interviewed three, and selected American Quality Schools. The organizers had three criteria for selecting an Education Management Organization. The EMO had to be a not-for-profit organization. Secondly, the EMO needed to have a base of operation, which would allow for unproblematic and frequent access to the Charter School. Finally, the EMO had to have a proven record of operation and success in the State of Indiana.

AQS became the EMO of choice because it has established a solid record of running nine schools in Illinois and Indiana. Their record of achievement and accomplishments at the Thea Bowman Charter School in Gary, Indiana, and East Chicago Enterprise Academy is impressive.

Describe the rights the school will have in relation to:

Ownership and use of the school facilities

Ownership and use of the curriculum and instruction materials

Selection and supervision of employees at the school

Through ISE and AQS, Xavier School of Excellence will have use of the physical facilities, all related curriculum and instructional materials, and through the principal, responsibility for the selection and supervision of all school employees.

In the attachments, include the signed contract for the Education Management Organization (EMO) listing the specific services the organization will provide.

See Attachment M for the contract between ISE and AQS.

Describe the school's contingency plan for continuing operations in the event the Education Management Organization's (EMO's) services are terminated.

It is the plan of the Indiana School of Excellence Foundation that in the event the services of AQS are terminated, ISE would immediately identify, select, and enter into an agreement with a new EMO. In the interim, ISE would be responsible for the continuity of management of the school.

In an attachment, provide the following information about each Education Management Organization (EMO) that will contract with the school:

- *Name of the Education Management Organization (EMO)*
- *List of all Education Management Organization (EMO) owner(s), directors, and officers*
- *Identify the legal structure of the Education Management Organization (EMO) (for-profit corporation, non-profit corporation, LLC, etc.)*
- *Provide the name, address, and phone number of the primary contact for the Education Management Organization (EMO)*
- *Provide the name and business address of the Education Management Organization's (EMO's) primary banking institution*
- *Identify the legal counsel for the Education Management Organization (EMO) (name, address, telephone number, and contact person)*
- *Identify the accounting firm for the Education Management Organization (EMO) (name, address, telephone number, and contact person)*

Please see Attachment N for the information requested above.

Describe the Education Management Organization's (EMO's) experience providing educational services, the types of services provided, the Education Management Organization's (EMO's) educational philosophy, and information demonstrating the Education Management Organization's (EMO's) success in providing educational services in other settings

AQS currently operates five successful charter schools in the City of Chicago, under a performance-based contract with the Chicago Charter School Foundation. Three of these schools were cited by a recent Chicago Tribune editorial as examples of Charter Schools academically performing at levels substantially higher than other public schools. It also manages a high school on the west side of Chicago under a contract with Chicago Public Schools.

In addition, AQS manages the Thea Bowman Leadership Academy Elementary and High School in Gary, Indiana, and the East Chicago Enterprise Academy in East Chicago, Indiana, both authorized by Ball State University. These schools have been cited by the Indiana Department of Education as "Exemplary Schools".

Lastly, all AQS managed charter schools use the Core Knowledge Curriculum as the basis for the academic program and the Paideia method of instruction. All AQS managed schools utilize a strong character development and leadership component as an integral part of the educational program.

AQS managed schools continue to substantially outperform comparable schools in their geographic areas on the respective State Achievement Tests. All AQS schools operate in a philosophical framework that demands student achievement, good citizenship, parental involvement and consistent discipline. The rigorous academic program also commits the teaching and administrative staff to the integration of technology into the curriculum not as an end in itself but as an essential tool that facilitates the learning process.

Describe how the governing board will oversee the Education Management Organization (EMO) and include clearly delineated roles and responsibilities between the board, staff, and Education Management Organization (EMO)

The Xavier School of Excellence School Board will oversee the education management organization's performance in:

- implementation of the school's curriculum
- hiring staff and developing the staff
- creating culture of achievement among students, parents, teachers and administrators
- empowering students to make decisions and assume more responsibilities
- encouraging parents to be partners in educating their children
- overseeing the financial accountability of the school
- focusing on the school's stakeholders: the students, parents, property owners, taxpayers, and the business community.
- solving day-to-day crisis management issues
- acting as the public voice of the school
- expanding community outreach

Describe which assets will be under the school's control versus which assets will be under the Education Management Organization's (EMO's) control and how these assets will be procured

As discussed in Section B, the Indiana Schools of Excellence Foundation will hold the charter and have the ultimate fiduciary responsibility for the school. Therefore, the school, Xavier School of Excellence through ISE, will have control of all the associated assets. Assets will be procured by AQS, with the board's approval of expenditures at their monthly meetings.

Explain the process for hiring all employees of the school and which entity, the organizing board or the Education Management Organization (EMO), will actually employ the school's staff

All employees of the Xavier School of Excellence will be employees of American Quality Schools, and as such, AQS, through the XSE Principal will have the responsibility for hiring all employees.

Describe the Education Management Organization's (EMO's) understanding education and funding laws in Indiana

American Quality Schools has a deep understanding of the education and funding laws of Indiana through its management of two "Exemplary Charter Schools" located in East Chicago, Indiana and Gary Indiana.

Describe the financial penalties identified if the Education Management Organization (EMO) does not achieve objectives of the Education Management Organization (EMO) contract

There are no financial penalties established within the ISE/AQS contract.

Verify that the school and Education Management Organization (EMO) will adhere to the requirements of the Ball State University Office of Charter Schools Policy on Contracting with Education Management Organizations (EMO's).

Xavier School of Excellence and AQS agrees to adhere to all the requirements of the Office's Policy on Contracting with Educational Management Organizations.

Section E - Strong Educational Program

The school must have a well focused and articulated curriculum that is fully aligned with the Indiana Academic Standards and graduation requirements.

The curriculum aligns with Indiana's Academic Standards. (See Attachment O for the description of the educational program). AQS believes that a clear set of standards outlines expectations for student learning and provides a focal point for teachers in lesson planning.

Teachers are required to include any standards taught in their lesson plans and team leaders are responsible for insuring that all of the standards are met. Clear expectations also provide the necessary guidelines for educational decision making in purchasing programs and materials.

Because student achievement is relative to Indiana's Academic Standards, it is important for AQS to identify and respond to problems in meeting the learning targets. Careful analysis of assessments described in Pupil Assessment by teachers and team leaders will enable AQS to make changes and improvements in programs, resources and support.

Provide a scope and sequence with major units of instruction for each subject and grade the school would offer during its first five years of operation. Also provide a table verifying the alignment between the school's educational program and the Indiana Academic Standards and graduation requirements.

In Attachment P is a scope and sequence of major units of instruction for each subject and grade level that will be taught at XSE. Attachment P also includes the alignment of the school's curriculum with the Indiana Academic Standards.

Indicate whether the school plans to offer full-day or half-day kindergarten each year.

The school plans to offer full day kindergarten each year.

In an attachment, provide a lesson plan in reading, mathematics, science, and social studies for each even numbered grade the school will offer in its first five years of operation.

In Attachment Q are lesson plans in reading, mathematics, science, and social studies for each even numbered grade (2,4,6, & 8) that XSE will offer in the first five years of operation.

Describe why this particular educational approach was selected over other options. List other educational approaches that were considered for this proposed school and why those other approaches were not selected. Describe how the school's education program and schedule for delivery are appropriate for the student population the school expects to enroll.

AQS has demonstrated over the last 9 years that the Core Knowledge Sequence (CKS) program, along with a longer day and longer year, and a personal education plan for each student has proved successful.

The Core Knowledge Sequence (CKS) is a comprehensive educational program that specifically outlines the content to be taught at every grade level from Kindergarten through 8th grade. All subjects, language arts, social studies, mathematics and science as well as the fine arts are taught in a sequential manner. It provides a solid, coherent foundation of learning, while allowing flexibility to meet local standards. With the proven success of the CKS, other educational approaches were not considered.

The instructional methods that are the foundation for our Xavier School of Excellence will be the Paideia Teaching Approach. Paideia instruction offers a unique approach to active learning, with a two-fold goal to teach all students to think and enable adults in students' lives to see themselves as life-long learners. To this end, Paideia classroom combines four instructional techniques: Didactic instruction, Socratic discussions, coaching and collaborative teaching.

Didactic Instruction refers to oral or written presentation in all subject areas. Through Didactic instruction, students acquire factual knowledge about specific events and models. Instruction is focused on basic concepts required for more in depth understanding of a subject, not the memorization of facts.

Socratic discussions require students to think critically, consider complex ideas, actively listen and communicate with multiple partners. Socratic seminars are the highlight of Paideia education. Seminars focus on literature, historical documents, works of art and other primary source materials. These seminars encourage children to use critical-thinking skills and express their thoughts about the world around them. All participate and share ideas and opinions at the level that is appropriate to their level of understanding. Articulation, conceptual understanding and listening are the key skills addressed.

Coaching is used as a means of developing and practicing the skills of learning. Students practice and master skills introduced during their Didactic classroom experiences. Teachers use a variety of small group activities to involve students in guided practice activities. Students are provided appropriate feedback and reinforcement at each step in their learning process. Coaching focuses on active participation. Teachers use coaching as an important part of differentiating instruction within the group context.

Collaborative teaching is used to expose students to the strengths of different professionals, as a way to bring the expertise of parents and community members to the classroom. Collaborative teaching is different from simply co-teaching a lesson in the traditional sense. In collaborative teaching, the collaborating instructors teach material that spans disciplinary boundaries constructively. Instructors teach as a team, bringing cross-disciplinary dialogue into a course. Collaborative teaching in our proposal also means utilizing the experience and knowledge of outside professionals who can contribute to our curriculum through selected teaching, guest lectures, and student mentoring.

The longer day and year allows the teachers to provide additional guidance for those not only in need of additional support, but also to increase the achievement level for all students. Areas not represented in the curriculum will be supplemented with appropriate material that aligns with the local standards.

Describe the research on which the chosen curriculum is based. Provide citations where the research support for the chosen curriculum may be found.

The Core Knowledge Curriculum is a comprehensive, research-based educational program.

Please see the following website

http://coreknowledge.org/CK/about/research/eval12_2002.htm

for the citations for the research supports and Attachment R.

Describe how the school's educational program will increase student achievement as measured by identified test/assessments.

AQS's proven success in increasing student achievement is well documented. At Thea Bowman Leadership Academy, 37.5% of students were passing English/language arts or math on the ISTEP in fall 2003 the first year of operation. By the fall of 2005, 60% of the students were passing English/language arts or math on the ISTEP. In 2006, Thea Bowman Leadership Academy was recognized by the Indiana Department of Education for "Exemplary Progress." At East Chicago Urban Enterprise Academy, 58.7% of the students were passing English/Language arts or math on the ISTEP in fall 2006 after one full year of operation. East Chicago Urban Enterprise Academy was also recognized by the state for "Exemplary Progress", the only public school in East Chicago to do so during the 2006-2007 academic year. AQS strongly believes that these results can be replicated at the Xavier School of Excellence.

Provide a school calendar and school day schedule for the first year of operation. Specify the first day of instruction and the day on which instruction will end that first year. Describe the length of a typical school day. Explain how the school calendar and school day schedule are sufficient for the delivery of the school's educational program.

Attached in Attachment S is a copy of the proposed school calendar and school day schedule.

AQS's experience with this approach has yielded positive educational results. With a longer day and longer year students spend more time in their core subject areas.

This results in students raising their achievement level both in the classroom and on the ISTEP, and provides a greater opportunity for the children at all levels of learning to demonstrate skill mastery. Also, in Attachment S is an example of the schedule for a typical day of instruction.

Indicate the start time and ending time for the instructional day. State the number of actual hours of instruction (excluding lunch, recess, time between classes, etc.) the school will have each day.

The school day will begin at 8:00am each day, and end at 3:30pm M/T/W/H. Fridays will end at 1:45pm. That provides for approximately 6 hours of instruction on M/T/W/H and 4.5 hours of instruction on Fridays.

Provide an illustration of a typical school week and the classes or instructional activities that will occur during that week. Indicate the length of time that will be assigned to each instructional activity of that week.

In Attachment T is an illustration of a typical school week, by grade, and the classes that will occur during that week.

Include an example of the schedule for a typical day of instruction including the length of the school day.

In Attachment U is an example of the schedule for a typical day of instruction.

Describe how the school will utilize technology in its educational program.

Teachers and students will have three avenues to integrate technology into the curriculum. First, every classroom will be equipped with not only a computer for the teacher, but also a number of student computers to facilitate student use. Secondly, there will be a dedicated computer lab classroom for students to acquire the necessary skills to achieve mastery as well as to equip them with quintessential research skills. Lastly, computers on wheels (COW) will be available to all classrooms to support, analyze and assimilate topics and ideas derived from the curriculum.

Indicate how the educational program will address students with special needs, limited English proficient students, and students entering the school working below grade level.

All students will be assessed at the beginning of the school year using NWEA. From the assessment a personal educational plan will be designed for each student focusing on reading and math. Students who require special attention will be provided with the necessary assistance and materials at their achievement level. As indicated in previous sections, the curriculum will provide for all levels including special needs students. The classroom teachers with the assistance of the team leader will create a program that will meet each student's individual needs.

For students requiring assistance with English as a Second Language, an ESL teacher will be afforded to them. These students will participate in an Authentic Assessment for English Language Learners which shall incorporate a teacher observation checklist, an analytic scoring rubric, and where applicable, a student self-assessment. Additionally, periodic training modules will be implemented incorporating English Language Learners in large scale assessments.

Section F - Qualified and Dedicated Teachers

State whether the school will employ certified teachers. List the number and title of all full time teachers, including teachers of students with disabilities, the school will employ or contract for the first five years of operation.

The school through their Education Management Organization, American Quality Schools, will employ the services of certified teachers.

For the first five years of operation, the Xavier School of Excellence (XSE) will employ the following teaching positions:

	<u>1st Year</u>	<u>2nd Year</u>	<u>3rd Year</u>	<u>4th Year</u>	<u>5th Year</u>
Kindergarten	2	2	2	2	2
First Grade	2	2	2	2	2
Second Grade	2	2	2	2	2
Third Grade	2	2	2	2	2
Fourth Grade	2	2	2	2	2
Fifth Grade	2	2	2	2	2
Sixth Grade	0	2	2	2	2
Seventh Grade	0	0	2	2	2
Eighth Grade	0	0	0	2	2
Special Education (as needed)	1	2	2	2	2
Physical Education	1	1	1	1	1
Spanish	1	1	1	1	1
Music	1	1	1	1	1
Art	1	1	1	1	1

Verify that all teachers will meet teacher certification requirements at the time of hire each year.

All prospective teachers will be required to submit a copy of their State of Indiana license, college degree(s), and a copy of their college credits sent directly from the university to AQS.

Describe the process for recruitment of Highly Qualified teachers. Verify that all teachers will meet the Highly Qualified requirements of the No Child Left Behind Act (NCLBA) each year.

The AQS recruiting process is an on-going activity throughout the year. AQS utilizes a multiple approach philosophy to provide the school with exposure to the greatest number of potential certified staff. First, a representative of AQS not only will attend every teacher fair organized by Indiana universities and colleges, but AQS will also participate in many job fairs hosted by institutions outside of the state within the Midwest region. Secondly, listings of available positions are posted on the web sites of job boards maintained by Indiana universities and other commercial entities, such as newspapers.

Also, AQS has a dedicated resource that proactively contacts and visits colleges and universities to promote the advantages of working at an AQS school throughout the year. Lastly, for many hard-to-fill certified position, AQS provides a monetary referral program to its employees who refer qualified candidates to join the school.

Each teacher will be given a list of NCLB requirements. Fulfilling these requirements will be a condition of employment with AQS.

List the ratio of students to certified teachers the school will have during each of the first five years of operation.

Given the school will enroll 300 students the first year, and the classroom teaching staff the first year is 12, the ratio is 25 students to each certified teacher (not including “specials”). As enrollments are expected to increase each year of 50 students, and two additional classroom teachers are brought on, the ratio will remain the same throughout the first five years.

Section G - Serving Special Needs Students

State how the school leadership will demonstrate the qualities to serve as the Public Agency Representative to assume administrative responsibility for special education services.

The school is committed to meeting all of the needs of all children *including* those with special needs as required by federal, state, and local laws and the state's charter statute.

The school leadership will coordinate the case management meetings of individual students with the VSEC psychologist, OT and PT providers. The school's Social Worker will monitor the services provided to ensure that they are in compliance with the demands of the Individual Education Plans. The General Education Intervention Team (GEI) which includes a member of the school's administrative team will meet regularly to monitor all special education referrals.

Indicate the number of full time highly qualified special education teachers and paraprofessionals the school will employ the first two years of school operation and the anticipated enrollment of students with disabilities.

The school will open as a K-5 school and each year add a grade until reaching eight grades making it a full K-8 elementary school. The initial number of certified special education teachers is dependent on the number of special education students the school enrolls. To start, it has been determined that one special education teacher will be needed. This is based upon the notion that usually at least 7 -11% of enrolling students make up the special education population. The second year of operation, the school will employ two special education teachers.

Describe how the school will proactively recruit highly qualified special education teachers and provide on-going, specialized support and professional development.

The AQS recruiting process is an on-going activity throughout the year. AQS utilizes a multiple approach philosophy to provide the school with exposure to the greatest number of potential certified staff. First, a representative of AQS not only will attend every teacher fair organized by Indiana universities and colleges, but AQS will also participate in many job fairs hosted by institutions outside of the state within the Midwest region. Secondly, listings of available positions are posted on the web sites of job boards maintained by Indiana universities and other commercial entities, such as newspapers. Thirdly, AQS has a dedicated resource that proactively contacts and visits schools of education to promote the advantages of working at an AQS school throughout the year. Lastly, for many hard-to-fill certified position (such as special education teachers), AQS provides a monetary referral program to its employees who refer qualified candidates to join the organization.

It is the policy of American Quality Schools (AQS), the educational management organization (EMO), to conduct extensive professional development sessions with their administrative and teaching staff on the legal requirements and effective teaching strategies for individuals with disabilities. This is not only part of the Summer Professional Development Program which occurs the two-weeks prior to school beginning, but also as part of the ongoing professional development activities that occur each Friday. AQS has a dedicated corporate special education professional who creates these professional development programs.

Describe how the school will provide a full continuum of services and placements for students with disabilities

The administrative and instructional staff will identify those children with special needs by prior assessment from a previous school, if feasible, or from assessment upon entrance to the school.

It is believed that all children can learn and that whatever the special needs of the child, the school is obligated to provide an individual educational program for him or her. All special needs children should have a continuously reviewed and fully implemented Individual Educational Plan (IEP). The school will provide for special needs children by placing them, as required by law, in the Least Restrictive Environment.

Students who have special needs will be assessed by the special education teacher and associated colleagues. A determination will be made as to what their individual educational program should look like to maximize their educational and social progress. In addition to hiring qualified special education teachers and aides, the school will work in conjunction with social workers, psychologists, and speech therapists when appropriate, to form a multi-disciplinary team, that will develop and implement a meaningful Individual Education Plan (IEP) for every student with special needs.

Students with disabilities education is driven by the IEP (Individualized Education Plan) which seeks to remediate deficits a student has in the core subjects (reading, math, and language arts) using various accommodations and modifications in the regular education classroom, and when necessary, in the special education classroom. During the creation of every student's IEP, the team discusses the student's progress and determines the most appropriate educational setting the student requires to successfully remediate their deficits. This decision is a joint team effort made by the Parent, Case Manager, Regular Education and Special Education teacher, Psychologist, Nurse and Social Worker who must provide educational justification for removing any student from the regular education classroom to receive services in a special education room. LRE is always taken into account before removing any student from the regular education setting and is the major factor the team considers when determining the best educational environment to successfully address our student's needs.

In regards to the student getting pulled-out for reading, this is consistent with LRE as based on several factors, including LRE, the team determined a "pull-out" reading program was the appropriate educational setting the student requires to address their individual reading needs.

For students requiring assistance with English as a Second Language, an English as a Second Language teacher will be afforded to them.

If the school will contract with a special education cooperative or a general service provider to serve students with special needs, identify that cooperative or general service provider and list the specific services the school will provide, as well as the specific services the cooperative or service provider will provide.

We have had discussions with the Ball State University Virtual Special Education Cooperative (VSEC) and have decided that the school will join VSEC because of the broad range and scope of services and instructional strategies the cooperative provides to charter schools. The school plans to utilize VSEC's services upon the planning, implementation, start-up, and day-to-day operation of the school.

Section H - Health and Safety

Describe how the school will provide for the health and safety of students, staff, and visitors.

In Attachment V is a copy of the Parent/Student Handbook for the Thea Bowman Leadership Academy which references the school's policies with regards to health and safety. This document will be used as a starting point to create a similar document for XSE.

List the staff that will be employed or contracted to administer these services:

Immunizations and other health requirements for students enrolled in public schools in Indiana

In accordance with Indiana law, all students admitted to the Xavier School of Excellence will meet the immunization and other health requirements listed in IC 20-34-4-2 Section 2. The school will maintain an immunization record of each student and file the required written reports with the state department of health and local health department.

Proper handling of medical records

All student medical records will be maintained, released, and destroyed in accordance with (1) the provisions of the Family Educational Rights and Privacy Act and the Indiana Public Records Act, and (2) records retention schedules and regulations of the county commission of public records under IC 5-15-6.

First Aid and emergencies

The Xavier School of Excellence will establish written policies regarding first aid and emergency medical care in cases of illness or injuries. The school will implement a school safety and evacuation plan, which will include, but not limited to, emergency preparedness instruction for staff and students. First Aid procedures and evacuation routes will be posted throughout the school.

Medications and medical treatments

The school nurse and other authorized school personnel will administer medications and treatment in accordance with IC 20-33-8-13 and other Indiana state regulations. All students requiring medication whether over-the-counter or prescription will be required to complete a medication administration form detailing the medication to be taken, duration, and the amount. When appropriate, the documentation will require a physicians' signature.

Health and vision screening

In accordance with Indiana state law, the Xavier School of Excellence will conduct: (1) an annual vision test, using the modified clinical technique, of each student upon the student's enrollment in either Kindergarten or Grade 1; and (2) an annual screening test of the visual acuity of each student enrolled in or transferred to Grade 3 and Grade 8, and of all other students suspected of having a visual defect.

In accordance with Indiana state law, the Xavier School of Excellence will annually conduct an audiometer test or a similar test to determine the hearing efficiency of the following students: (1) students in Grade 1, Grade 4, and Grade 7; (2) any student who has transferred into the school; and (3) any student who is suspected of having hearing defects. All other health screening will follow Indiana regulations.

Other health requirements

The special education teachers of Xavier School of Excellence and other instructional staff and administrators will participate in IEP meetings in compliance with the Individuals with Disabilities Education Act (IDEA) and the Individuals with Disabilities Education Improvement Act of 2004.

The Xavier School of Excellence will, in accordance with IC 20-19-5, meet all requirements regarding children's social, emotional, and behavioral health.

Describe how the school will address the general nutritional needs of enrolled students.

To address healthy eating, the Xavier School of Excellence will draft a School Wellness Policy, following guidelines outlined by the School Nutrition Association, which will detail nutritional standards and nutrition education goals. It is believed that the school environment can play a major role in children's health and nutrition habits, and an effective nutrition and wellness policy can help students learn the skills they need to make healthy choices. The school will monitor all food and beverages sold to students in vending machines, snack bars or school stores to make sure they contain healthy snacks. Additionally, all students each year will receive nutrition education that teaches the knowledge, skills, and values needed to adopt healthy eating behaviors that will be integrated into the curriculum. Nutrition education information will be offered throughout the school including, but not limited to, school dining areas and classrooms.

Describe the assistance the school will provide to students who come to school without adequate nutrition for learning.

The Social Worker for the Xavier School of Excellence will be the point person to provide assistance for students who come to school without adequate nutrition for learning. It is the policy of the EMO to provide pre-packaged nutritional breakfasts for those students who are eligible under the federal school lunch program.

The school will advertise to the parents of eligible students to get them to participate in the program. Those students who are not taking advantage of the free or reduced breakfast program and who are obviously in need of more adequate nutrition will be referred to the school's Social Worker.

Describe how the school will identify students who qualify for free and reduced-price meals.

The school will identify students who qualify for free and reduced-price meals through the use of the surveys sent out each fall.

Section I - Increasing Student Achievement

List each assessment the school will administer (including the ISTEP and NWEA) and the general schedule for administration. If an assessment is not required by the State of Indiana or the University, state why the assessment was selected and describe what that assessment will contribute to the educational process.

The ISTEP is administered annually each fall. In addition to ISTEP, the Xavier School of Excellence will administer NWEA MAP assessments in Grades 3-8, and the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) assessments in Grades K-2.

NWEA MAP tests are computer adaptive assessments available in reading, language arts, and math that are aligned with Indiana state learning standards. NWEA assessments will be administered in September and May. The initial NWEA assessment administered in the fall provides a baseline from which to monitor students' growth and set proficiency year-end targets. NWEA's *DesCartes: A Continuum of Learning* is a resource that teachers use to translate NWEA test scores into specific learning objectives targeted to individual student needs. Teachers then align these learning objectives to the Indiana State Standards, which in turn help students become more proficient on the ISTEP test. The NWEA assessment also alerts the EMO and school administrators to any deficits in current curricula so that additional learning materials can be purchased where needed. In the case of an entire class not showing growth, it is important to evaluate and where necessary, remediate the teacher's performance.

DIBELS are a set of standardized, individually administered measures of literacy development. They are designed to be short (one minute) fluency measures to monitor the development of pre-reading and early reading skills. Specifically, they assess student development of phonological awareness, alphabetic understanding, and fluency. Each measure is a reliable and valid indicator of early literacy development and predictive of later reading proficiency. The results are used to evaluate individual student development, using grade-level feedback in order to provide individualized instruction to students depending on the indicated Instructional Level (high risk, moderate risk and low risk). DIBELS assessments are administered weekly, monthly, or quarterly depending on the risk level of each student. Table 1 on the next page illustrates the minimum level expected for each grade level. Students not approaching these goals after interventions will then be evaluated for special services.

Describe how student progress, including progress for students with disabilities, will be monitored and how often it will be monitored.

All assessments are monitored as soon as the results are received by the EMO, principal, teachers, and all other instructional staff. We use all assessments to differentiate instruction within the classroom to make certain that students receive instruction designed to meet their individual needs and insure that progress will occur. Students with disabilities are included in this process and only differ in that their progress is relative to their Individual Education Plan.

List the levels of performance expected on each assessment the school will utilize each year. Indicate the amount of measurable growth students will attain each year on each assessment for the first five years of operation.

ISTEP

We are confident that Xavier School of Excellence will achieve in the second year of operation a minimum of a 5% gain on the base line ISTEP, administered the first year of operation. Our goal for subsequent years would be a 3% -6% yearly increase on the ISTEP. The school will meet AYP targets set by IDOE each year it is eligible.

Measurable NWEA Goals

The NWEA sets individual spring targets for every student based on the fall assessment and our goal is to increase the percentage of students reaching their target each year. The Xavier School of Excellence will attain a minimum of 50% of the students reaching their target growth after the first year of operation. We expect that subsequent years should see an increase of between 3% - 5% per year of students reaching their targets.

Measurable DIBELS Goals

The goals below are set by DIBELS and we have found them reflect students receiving appropriate reading instruction in the primary grades. Interventions will take place with any student not approaching these grade level goals in order for them to be met. In some cases special services may be required after evaluation of students who are unable to meet the goals.

Kindergarten	Initial Sound Fluency	25 SPM
	Phoneme Segmentation Fluency	35 SPM
1 st Grade	Nonsense Word Fluency	50 SPM
	Oral Reading Fluency	40 WPM
2 nd Grade	Oral Reading Fluency	90 WPM

List the school’s Academic Goals and Non-Academic Goals in measurable terms for the first five years of operation. List the corrective actions the school will take when it does not meet one or more of its Goals in any year.

ISTEP GOALS - While it is difficult to set measurable goals without sets of data for the students we would serve, we are confident that we will achieve the second year of operation a minimum of a 5% gain on the base line ISTEP, administered the first year of operation. Our goal for subsequent years would be a 3% -6% yearly increase on the ISTEP. The school will meet AYP targets set by IDOE each year it is eligible. Although charter schools are not held to the same consequences that follow a lack of improvement on the ISTEP as defined in Public Law 221, “**Commendable Progress**” is at the very least our expectation and our ultimate goal is to be a school attaining “**Exemplary Progress.**”

We are confident of our ability to sustain an upward trajectory to meet this goal, using the same model used at all AQS elementary schools: analyze NWEA data; address and remediate student deficiencies; work with teachers to improve and differentiate instruction; and supplement curricula when necessary. This plan will also be used to correct any problems in not meeting one or more Goals in any one year.

NWEA GOALS – The school will attain a minimum of 50% of the students reaching their target growth after the first year of operation. We expect that subsequent years should see an increase of between 3% -5% per year of students reaching their targets. It is essential that the NWEA test be taken three times a year to monitor progress in reaching NWEA targets. The September test allows NWEA to set a reasonable target for every student based on national norms, but having the ability to analyze these data after a midyear test and then address and remediate student deficiencies, along with providing additional support to teachers insures greater student success on meeting their target growth on the final spring test.

DIBELS GOALS – Students scoring in the red and yellow levels on the initial DIBELS tests are tested biweekly rather than quarterly (students scoring in the green level) to look for growth. If adequate growth, after explicit instruction in small groups is not achieved, the student is recommended for Response to Intervention.

Non-Academic Goals include:

- 95% daily attendance rate
- 90% year-to-year retention rate
- 90% positive approval rating on the AQS Customer Satisfaction Survey of Students, Parents, and Teachers
- A reduction in the discipline referrals to the Disciplinarian as reflected in the discipline accountability record from year to year over the 5 year period because of a school wide **positive behavior system** or **PBS**

Attendance is necessary for students to achieve and AQS works extensively with parents to understand the importance of their student being in school.

We are also confident of our year-to-year retention rate based on our ability to increase student performance. Parents want their children to attend high performing schools and raising students' performance levels insures that students will not leave the school unless they are moving out of the area.

It is important that the EMO, Students, Parents and Teachers work together as a team to achieve the level of performance that each student is capable of attaining. These relationships are built on respect for each group, working together to reach the common goal of raising student performance.

A major advance in school-wide discipline is the emphasis on school-wide systems of support that include proactive strategies for defining, teaching, and supporting appropriate student behaviors to create positive school environments. Instead of using a patchwork of individual behavioral management plans, a continuum of positive behavior support for all students within a school is implemented in areas including the classroom and non-classroom settings (such as hallways, restrooms).

Positive behavior support is an application of a behaviorally-based systems approach to enhance the capacity of schools, families, and communities to design effective environments that improve

the link between research-validated practices and the environments in which teaching and learning occurs. Attention is focused on creating and sustaining primary (school-wide), secondary (classroom), and tertiary (individual) systems of support that improve lifestyle results (personal, health, social, family, work, recreation) for all children and youth by making problem behavior less effective, efficient, and relevant, and desired behavior more functional.

Indicate how the school will meet the Adequate Yearly Progress (AYP) requirements of the federal No Child Left Behind Act (NCLBA) each year and specific actions the school will take in any year in which the school does not meet the NCLBA requirements.

To ensure NCLB requirements are met, Xavier School of Excellence will utilize continuous assessment of student proficiency of skills and concepts; concentrated analyses of student assessment data and classroom performance; ongoing teacher professional development; and intensive parental involvement and collaboration programs. Information from assessments, student class work, and homework will discern specific areas of strength and areas of needed improved instruction within each Indiana learning standard.

Teachers and other instructional staff will be equipped with the necessary materials and professional development to ensure all students are appropriately challenged and receive instruction tailored to their needs. Students will also be engaged in setting their performance goals, tracking their progress, and understanding their role as part of the overall success of the school. Additionally, parents will be encouraged to be active participants in their child(ren)'s education to continue students' learning at home and sustain student proficiency in subject areas over the summer months.

List the specific corrective actions the school will take when students do not meet expected levels of performance.

For those students who do not meet expected levels of performance, The Xavier School of Excellence will implement numerous remediation strategies including:

- SRA's *Direct Instruction*, which is designed for students who have not learned in other programs; have little recall and limited attention span; and who fail to remember and follow instructions
- *Corrective Reading Comprehension* is designed for students who read without understanding
- *Drill & practice* are repetitive activities used as reinforcement tools to help students master materials at their own pace
- *VersaTiles* are engaging, skill-specific activities that provide individualized reinforcement
- Flexibility grouping and small group instruction with teacher aides
- After school programs focused on one-on-one tutoring
- Peer tutoring

Section J - School Climate and Student Discipline

Describe the school's disciplinary policies. Describe how and when those policies will be distributed to staff, parents and students.

The school will expect all students to conduct themselves in a socially responsible manner. Disciplinary measures will be used to maintain a safe and orderly school environment, which promotes the school's philosophy of providing a college preparatory education for all students.

The school's *Discipline Code* will apply to the actions of students during school hours, before and after school, while on school property, at all school sponsored events, and when the actions affect the mission of the school. Students may also be subject to discipline for serious acts of misconduct, which occur either off-campus or during non-school hours, when the misconduct impacts the mission or reputation of the school.

Each discipline case will carry its own merit and will be adjudicated according to the facts accompanying the case. The school's staff shall consider all mitigating circumstances prior to disciplinary action. Mitigating circumstances shall include, but are not limited to, the following:

- Age, health, maturity, and academic placement of a student
- Prior conduct
- Attitude of a student
- Cooperation of parents
- Willingness to make restitution
- Seriousness of offense
- Willingness to enroll in a student assistance program

In some cases the school's administrative personnel may deem public service a necessary component of the disciplinary action. Public service may include, but is not limited to: repairing or cleaning property damaged as a result of the offense(s); participating in landscaping, gardening and/or other projects aimed at beautifying school property or the community; and/or providing services that improve the quality of life for community members in accordance with various community partnerships.

Each category of offense listed on the following pages has a minimum and maximum disciplinary action associated with it. After considering the actual disciplinary violation and factors such as those listed above, the school staff shall determine the disciplinary action within the minimum/maximum range to which the student shall be subjected.

CATEGORY I

These acts of misconduct include, but are not limited to, the following:

- Running and/or making excessive noise in the hall or school building or premises
- Violating the dress code
- Persistent tardiness to school or class

Students who commit any of these acts are subject to teacher-student conferences as the result of a first offense and may, as a result of repeated violations and depending on the circumstances, be subject to the maximum penalty of a one-day, in-school suspension. As a supplement and/or alternative to suspension, school staff may require students to complete between 1 and 8 hours of public service as commensurate with the seriousness of offense(s).

CATEGORY II

These acts of misconduct include, but are not limited to, the following student behaviors that disrupt the educational process at the school:

- Excessive truancy (Absence without just cause)
- Use of profane, vulgar or obscene words, gestures or other actions and media which disrupt the school environment
- Insubordination (Refusal to follow orders, directions or stated school rules)
- Participation in acts designed to disrupt classroom or school activities
- Repeated failure to follow state school rules and procedures
- Smoking on school property
- Acts that obstruct or interrupt the instructional process in the classroom
- Repeated refusal to participate in classroom activities or
- complete academic assignments
- Fighting or threatening any student or staff member
- Carrying of cell phones, pagers or other electronic devices
- Leaving the classroom without permission

Students who commit any of these acts are subject to one after school or Saturday in-school detention and teacher-student conference as a result of a first offense and may, as a result of repeated violations and depending on the circumstances, be subject to the maximum penalty of a five day out-of-school suspension and teacher-parent conference. The degree of the suspension whether in school or external, as well as length of suspension, shall be determined by the school's staff and/or Board. As a supplement and/or alternative to suspension, school staff may require students to complete between 3 and 12 hours of public service as commensurate with the seriousness of offense(s) or in conjunction with a partnership with a local community organization.

CATEGORY III

These acts of misconduct include those student behaviors that very seriously disrupt the orderly educational process in the classroom, in the school, and/or on the school grounds. These acts of misconduct include, but are not limited to, the following:

- Assault on a student or any school employee (Assault is interpreted as an attempt to do bodily harm to a student or to any staff member)
- Persistent refusal to follow stated school rules and procedures
- Arson
- Destruction of property
- Creating a false fire alarm
- Repeated Category I and Category II offenses
- Possession of weapons
- Any act that endangers the safety of the other students, teachers or any school employee
- Theft
- Trespassing
- Involvement in gang activity
- Sexual harassment or assault on others
- Use, possession, sale, or delivery of alcohol, illegal drugs, narcotics, controlled substances, contraband or look-alike contraband/drugs

Students who commit any of these acts are subject to a maximum ten-day, out-of-school suspension and parent-teacher conference and may, depending on the circumstances, be subject to the maximum penalty of expulsion. As a supplement and/or alternative to suspension or expulsion, school staff may require students to complete between 6 and 30 hours of public service as commensurate with the seriousness of offense(s).

SUSPENSION AND EXPULSION

When a student's misconduct results in the need to suspend or expel the student, the following procedures shall be followed:

Suspension Not Exceeding Ten School Days: Students suspended for ten school days or less shall be afforded due process in the following manner:

The student shall be given oral or written notice of the charges against him/her; an explanation of the basis for the accusation; and a chance to present his/her version of the incident.

Suspension In Excess of Ten Days and Expulsion: Students suspended for more than ten school days and/or expelled as a result of gross disobedience or misconduct shall be afforded due process in the following manner:

The Academy will request that the student's parents or guardian appear before the school's Board of Directors, an appointed hearing officer, or a Board representative. Such requests will be made by registered or certified mail and state the time, place, and purpose of the meeting. In addition to advanced written notice of the hearing, the student shall be afforded sufficient time to prepare for the hearing, the right to be represented by counsel, the right to present evidence and witnesses and school personnel. The expulsion hearing need not take the form of a judicial or quasi-judicial hearing. In no event shall a hearing be considered public. Further, at the discretion of the Board the hearing may be closed to those individuals deemed advisable, except the student, student's parents or guardians, the student's attorney, at least one school official, and Board's attorney at all times. Witnesses shall be admitted to a closed hearing to the extent necessary to testify.

The school Principal may suspend students with disabilities and cease educational services for up to ten consecutive or ten cumulative school days in one school year without providing special education procedural safeguards. When school staff anticipates a recommendation to an alternative school, a referral for expulsion, or anticipates that suspensions may exceed ten cumulative school days, the following regulations apply:

- A. School staff must provide written notice to the parent or guardian that a disciplinary action is being considered and the date of an Individualized Education Program (IEP) meeting, which must be held within ten days of the date of this misconduct.
- B. The IEP team must:
 1. Determine whether the misconduct is related to the student's disability by reviewing evaluation and diagnostic results, information from the parent/guardian, observations of the student, and the student's IEP and placement. The behavior is not a manifestation of the student's disability if the student was given appropriate special education supplementary aides and intervention strategies; and the disability does not impair the ability to control behavior.
 2. Review and revise, if necessary, the behavior intervention plan or, as necessary, develop a functional behavior assessment and intervention plan to address the misconduct.
 3. Include in the IEP those services and modifications that will enable the student to continue to participate in the general curriculum and address the behavior so that it will not recur.
 4. Determine the appropriateness of an interim alternative educational setting.

If the student's behavior is not a manifestation of the disability, school staff may apply the School Discipline Code, taking into consideration the student's special education and disciplinary records. In no event, however, may the student be suspended for more than 10 consecutive or cumulative school days in a school year without providing appropriate educational services.

If the student's behavior is a manifestation of the disability, the student's placement may be changed to an appropriate interim educational setting for 45 days if the student carried a weapon to school or a school function, knowingly possessed or used illegal drugs, sold or solicited the sale of a controlled substance while at school or a school function, or is substantially likely to cause injury to himself/herself or others.

Students with disabilities, even if expelled, must be provided with an appropriate education in an alternative education setting.

New federal regulations offer some flexibility in suspending students with disabilities in excess of ten school days in the school year in certain circumstances. In order to determine whether the circumstances permit a suspension in excess of ten days per school year, consultation by Academy representatives with appropriate legal counsel will occur.

The school will distribute the parent/student handbook during the school's initial open house prior to the start of school in August. At that time the school staff will take some time and go through the discipline code with parents and ask them to sign the form at the end of the handbook to confirm that the policies have been read.

The staff will receive their copy of the discipline code that is included in the handbook at Professional Development that is held every August prior to the start of the academic year.

Given that The Xavier School of Excellence recognizes that the ethical and moral development of our students is a critical and essential part of its mission and is an integral and part of each child's education, Character Education will be an integral element of our educational program. For example, a component of the character education curriculum is the middle grade workbook, *Doing What's Right: Case Studies in Character Education*. The workbook is compiled of a selection of case studies created from real life stories about the issues preteens and teenagers face daily. Each case study focuses on a character virtue(s) that correspond to the problem(s) presented. The students are asked to read the case studies and then go through the case study analysis process to solve the problems highlighted and then answer the accompanying questions. This is a significant process for the students to go through for it teaches them not only to solve problems, but gives them effective strategies to solve those problems, thereby developing forethought, a strong emotional core, and confidence in their abilities. The teachers are asked to cover one case study once a week.

Describe the interventions that will be in place for students who demonstrate inappropriate behavior.

The AQS approach to student discipline is a combination of various approaches.

- 1) Prevention – Our major emphasis is to minimize the occurrences of inappropriate behavior through prevention. Such negative behavior is minimized through:
 - a. Competent, well-prepared teachers who actively engage students in the learning process.

- b. On-going instruction and emphasis on character education as an integral part of the school curriculum.
 - c. A clear set of rules and expectations regarding student behavior understood by parents, students, and faculty.
 - d. AQS schools currently utilize the Positive Behavior Intervention Strategies (PBIS) system. Essentially this approach emphasizes the positive rewards of good behavior on the part of students. The first step involves a consensus on the part of the faculty and administration as to what the expectations of good behavior will be throughout the school. This key step ensures that there will be consistency among faculty in rewarding good behavior in a fair way. During the school week students are given cards when they are observed doing something generally accepted as “good” behavior. This might entail helping a fellow student or being considerate of others’ feelings. The good behavior cards are placed in a jar and each Friday names are selected from that jar and small rewards are given. The reward might be a pen, notebook, special privilege, or lunch with the principal. Teachers who are fair and consistent in their application of the program can also receive small rewards such as gift cards. AQS has found that this process has had a positive impact on reducing student discipline problems and encouraging positive student behavior.
- 2) Remediation – Students who do exhibit inappropriate behavior are provided with the following steps of remediation:
- a. The teacher and/or school dean for discipline reminds the student as to the provision of the AQS discipline code and the potential consequences of poor behavior. Thus, a first warning is given.
 - b. A second infraction results in the consequences identified in the discipline code being administered.
 - c. A third infraction results in additional after-school character education or detention assignments.
 - d. Subsequent infractions will result in school suspension or school expulsion.

In an attachment, include an outline of the school’s Student Rights and Responsibilities Manual
See Attachment V for an example of the American Quality Schools Parent Student Handbook.

Section K - Sound Financial Management

Which board will have direct oversight and be responsible for the financial management of the school? What actions will the board take to ensure the financial viability of the school?

The Indiana Schools of Excellence Foundation will have oversight and fiduciary responsibility for the financial management of the school.

A standing ISE finance committee will be created, which will consist of three of the ISE board members to oversee the financial management of the school. These three board members will be Lazaro Cardenas, Yolanda Turner-Smith, and Charles Jamerson. This committee will meet on a monthly basis to review financial reports submitted by AQS.

The ISE board, in its contract with the EMO, American Quality Schools (AQS), requires monthly financial statements, which are reviewed by the board and its independent accountant. In those years when the Indiana State Board of Accounts does not audit the financial condition of the school, the board will cause an audit, conducted by a reputable auditing firm to be performed.

What actions will the board take when financial concerns arise, including low enrollment in any particular school year? List the members of the board who will be directly responsible for the financial oversight of the school. Describe how each of these board members is qualified for the oversight of the finances of the school.

If financial concerns do arise, the ISE board will in consultation with Ball State, AQS, and others, devise a plan to alleviate the situation, and adjust expenditures with respect to revenues. However, through sound financial planning and good fiscal management the board will steer a prudent course designed to foresee negative developments and prevent a financial crisis.

Several members of the board have effectively performed this role for over two years for the Veritas Academy in South Bend, IN. These members are: Lazaro Cardenas and Yolanda Turner-Smith.

Describe how the school will ensure that its financial management team is competent. What will the qualifications be of the staff directly responsible for the day-to-day finances of the school?

The management of the financial affairs of the school will be under the control of the ISE board through the chief financial officer of American Quality Schools, who will report to the board on a monthly basis.

At the present time AQS effectively and responsibly manages over \$20 million on behalf of the charter schools it operates in Indiana and Illinois. AQS also utilizes an in-house CPA, who prepares all required financial statements and, with the experienced AQS accounting staff, will oversee the daily financial transactions of the proposed school. In addition, the services of Bookkeeping Plus, an Indiana accounting firm, that services numerous Indiana charter schools will be sought for specific accounting and regulatory advice and counsel when necessary.

Describe the level of knowledge and experience the founding group has with the state funding formula and available federal grants.

There are several members of the founding group who have over seven years of experience dealing with the Indiana state funding formula and Federal Grants. Those members are Yolanda Turner-Smith, Larry Cardenas, Ronda Davis, and Gwen Knowlton.

The EMO, AQS, has experience and familiarity with the State's financial administrators and the State funding formula, having experience it in managing the financial affairs of the Thea Bowman Leadership Academy and the East Chicago Urban Enterprise Academy.

Identify who (board members, administrative staff, or Organizer) will be responsible for:

Developing the annual budget each year

The budget will start at the functioning level of the organization namely the teacher or other areas such as custodial. Beginning in January, teachers and the other identified personnel will be given work processing papers which will have the previous year's budget on those items directly under their control. The teachers and the other personnel will be in a position to make their recommendations for the upcoming school year. The team leaders and the principal will also be given worksheets to make their recommendations for the upcoming year. AQS will then submit to the school board the proposed budget. The school board will review and may make adjustments in consultation with AQS. The budget will then go to the entire ISE board for final approval.

Approving expenditures

All expenditures are recommended to the principal through the administrative channel established in each school. Eventually, the request for expenditure is submitted to central administration for payment. The school board is kept informed by regular monthly reports that include the payee, the purpose of the payment, and any other data which is relevant to the payment. Each month the board will vote on the payments to all the vendors who have submitted appropriated paperwork and have been processed by the AQS staff. No expenditure is to be submitted to the central office without the principal's approval.

Reporting on financial operations

The reporting of financial operations is important to the success of charter schools. Taxpayers are increasingly aware of the fact that the majority of public funds go towards financing public education. The school will report its financial information using traditional sources as furnished by the Indiana Department of Education. The school acknowledges it is subject to a biannual audit (and review in the off-audit years) and will fully cooperate in such.

In addition to the formal biannual audit, the board will avail itself to the financial information presented to it on the monthly reports. The ISE board, in its contract with AQS, requires monthly financial statements, which are reviewed by the board and its independent accountant. In those years when the Indiana State Board of Accounts does not audit the financial condition of the school, the board will cause an audit (or less-costly review), conducted by a reputable auditing firm to be performed. The board will make its financial information available to the local press and seek to inform local media about the school's financial condition whenever practical. The school will publish its financial information each year as required.

In the required budget forms, ensure the budget is balanced each year, all sources of revenues are identified and budget expenditures are consistent with the school's administrative and educational plan.

See Appendix B for the completed pre-operational and budget forms for the first five fiscal years of operation.

Section L - Student Enrollment

On the attached age and grade range chart (see Attachment A), list the grade configurations and minimum and maximum enrollment the school will have in its first five years of operation. Also list the year, the grade configurations, and maximum enrollment when the school will reach its expected capacity.

Please see Attachment A for the Age and Grade Range Chart for the first five years of operation for the Xavier School of Excellence.

Describe the recruitment and enrollment procedures the school will follow to ensure that the school is open to all students. Describe how a random selection process will be used when any grade is over-enrolled.

Our plan calls for the Xavier School of Excellence to begin with two sections of 25 students per section in each of grades K-5. Thus, the school would open with a total enrollment of 300 students. The second year, with the addition of Grade 6, enrollment will increase to 350 students. By the fourth year, the school's total capacity will be 450 students.

The recruitment procedures for the Xavier School of Excellence will include:

1. An informational brochure mailed to households targeted to those with children in the age group our school will serve.
2. Radio spots informing the community about the school with information for enrollment.
3. Scheduled community information meetings in various parts of the city.

Enrollment decisions shall not be made until the advertised application process has been open to the public for at least three (3) weeks. Should applications for enrollment exceed available school capacity, a lottery will be held in an advertised public meeting by an independent third party, upon at least ten (10) days' prior written notice to the BSU OCS, to determine who will be admitted to the school. A representative from BSU OCS may attend the lottery drawing.

During the lottery, students are randomly selected to fill the seats available in each grade. Admission priority will be given to siblings of current XSE students. Students who are not selected through the lottery will be placed on a waiting list created at this public meeting. Applications received after the lottery shall be added to the end of the waiting list in the order received. If seats become available during the enrollment period, students will be admitted from the waiting list to fill the available vacancies.

Describe how the school will identify the desegregation orders in effect in school corporations from which enrolling students seek admission. Describe how the school will ensure that it is in compliance with any desegregation orders that apply.

There are no current desegregation orders that would apply to the Xavier School of Excellence. If in the future any do, XSE would comply.

Section M - School as a Choice Option

Describe how this school will provide an educational choice that is needed in the intended community. Provide a description of each of the current educational choices in the intended community and list specific reasons why this particular new school is essential in light of the choices available. Provide convincing evidence of the demand for this new school.

The Xavier School of Excellence was founded on the basis of a large community population vocalizing the need for alternative choice options in education that will bridge the gap between the public and private school sectors (see Section A regarding need based research regarding the school). Currently the SBCSC faces barriers in education including high drop out rates, struggling ISTEP scores and other various degrees of academic troubles. Although there are several private school options, they are often not affordable for majority of the incomes that reside in the SBCSC. Xavier School of Excellence's mission will strive to fill that gap and steadily grow in the problem areas currently facing the SBCSC. This growth is measured through various criteria, including but not limited to ISTEP testing and NWEA, attendance and parent participation.

See Attachment I for the letters of support from the South Bend Community.

Positive growth in our schools reflects positive growth in our community thereby creating more viable options for business development and increasing the viability of the community as a whole

By providing a holistic approach to education through a strong academic curriculum, character development and community involvement, the business community in particular will play a major role in the XSE curriculum. The XSE will actively incorporate local businesses by seeking out real-life examples of how good character is essential to all aspects of success, resulting in the support of the community at large.

Although XSE is not currently being advertised, it will recruit and educate the community in regards to its missions through information brochures sent to targeted households, television and radio promotional advertisements and various informational meetings scheduled throughout the SBCSC.

Provide concrete examples of how community partners will play an integral role in the life of the school. Provide a list of organizations that may partner with the school and the nature of those partnerships. Describe how the school's mission and educational program are well understood and supported by the local community (three to five letters of community support must be included attachments). Describe the steps already taken to develop partnerships and plans to further develop additional community partnerships.

In a study done in 2003 by Blank, Melaville, and Shahs, research showed that schools that centered much of their learning around community partnerships demonstrated significantly improved academic achievement, better attendance, improved student behavior, a safe, disciplined learning environment and most importantly a higher quality of education; the foundational mission of the Xavier School of Excellence.

We who represent Xavier School of Excellence see Community Partnerships as way for the community to have a voice and present their ideas of what education should entail. By taking ownership in the process, the community becomes much more supportive of the schools and take an active approach to education resulting in a trickle down effect that is not only lucrative from an educational perspective, but causes the schools to become an investment reflective of the rich culture and opportunities that the community has to offer. When community residents and parents realize that they have a voice, the community on a whole becomes empowered; as does its reputation; causing the community to become a more attractive option for growth and commerce on any level.

Xavier School of Excellence aspires to be leaders in innovate public learning and community partnering. We aspire to develop a myriad of partnerships from corporate superpowers to local “mom and pop” that will give students a fully developed economic perspective of education and the community. Examples of community organizations that XSE aspires to partner with are:

Target- A nationally know retail organization, with well-established programs that give back to communities. Target sponsors the Take Charge of Education program which gives over \$200 million back to local schools in unrestricted funding per year. Most recently they have developed a field trip grant for \$1600 teachers per year (and growing) to expose children to the culture and community around them. By encouraging the students, family and friends to enroll in this program, Target will donate 1% of all purchases made directly to Xavier School of Excellence payable in two installments in April and September.

Great Lakes Scrip- Scrip is another term for substitute money. Great Lakes Scrip center would act on behalf of XSE to purchase large amounts of scrip from major retailers such as clothing, department, grocery stores and restaurants. Because the scrip is purchased with cash up front, the retailers offer a substantial discount. XSE then purchases from Great Lakes at a discount and re-sells the certificates to organization members at full face value. The reason for the effectiveness of scrip is simple: families generate revenue through purchases they would make anyway. If these families use scrip for these purchases, they can raise as much as \$40,000 to \$80,000 per year for XSE without spending an additional penny, thus, taking a “hands on” approach to creating a top quality education for their children.

XSE will be privileged enough to reside in a community with four universities: Notre Dame, St. Mary’s College, Bethel College and Indiana University of South Bend. We fully intend to connect with all of the entities to develop mentoring, tutoring and charitable opportunities that will benefit all of the students involved. In addition, Notre Dame offers a program called Upward Bound that’s sole purpose in encourage students of color to take a proactive approach to higher learning and education. XSE hopes to engage all eligible students in this or similar programming to create opportunities to script their education in a way that will directly impact their educational, career and ultimately life goals.

Another organization we have talked to is the Youth Service Bureau of South Bend, a local organization that is recognized as the best resource for youth and families dealing with various behaviors, social problems and emotional issues. Its main priority is to keep children out of the court systems, off of the streets and in school using highly effective early intervention and prevention strategies.

By partnering with such an organization, XSE can provide its students and their families with the necessary tools to reduce and perhaps alleviate those risk factors that serve as a direct impediment to education. This accompanied with Core Value education can significantly impact students by giving them the tools to initiate personal changes today that will profoundly impact society tomorrow.

In addition, XSE may partner with local businesses and churches, such as River of Life Church, First Impressions Resume and Career Consultation, South Bend Chamber of Commerce and the Indiana Center for History to bring outreach and hands on professional expertise into the classroom as resources, mentors and guides.

Describe how the school will build and maintain family-school partnerships; explain the strategic focus of those partnerships and how success will be defined and measured.

The support and involvement of parents is essential. Therefore, a Parent Advisory Council will be established and will meet on a regular monthly basis with the principal and other key administrators. The purpose of the group is to offer input into school activities and policies and to review information about the school. In addition, one member selected from the Parent Advisory Council will be appointed to the School Board as the parent representative, ensuring that institutional decisions reflect parental input. In addition, parents will be able to monitor their child's schoolwork real-time through PowerSchool, a web-based interactive grade book, as well as parents and other interested parties will also be able to track the school's overall educational progress by visiting the school's web site. Lastly, we will ensure that extra-curricular activities and parent/teacher conferences will be scheduled at times that are convenient for parents, and that the school has a "parent-friendly" climate that welcomes parents to become part of their child's education."

Success in the area of family-school partnerships will be defined and measured as part of the school's operational goals:

- The school will have a 95% average daily attendance rate.
- The school will have a 90% year-to-year student retention rate.
- The school will have a 90% positive-approval rating on the AQS Customer Satisfaction Survey of Students, Parents, and Teachers.

List the minimum enrollment numbers the school must have each of the first five years of operation for the school to be financially viable.

The minimum enrollment numbers we feel the school must have each year to be financially viable are as follows:

- Year One = 240
- Year Two = 280
- Year Three = 320
- Year Four = 340
- Year Five = 360

For each year of operation, list the percentage of students enrolling at the beginning of the school year expected to remain at the school through the last week of the school year.

As presented in Attachment A, we expect a 96% retention rate of students enrolling at the beginning of the school year through the end of the school year.

For each year of operation, list the percentage of students enrolled at the end of the school year expected to return to the school the following year.

As presented in Attachment A, we expect 90% of the students enrolled at the end of the school year to return to the school the following year. Any available seats in a given grade that would be available would then be filled by contacting students/parents on our waiting list.

What percentage of students who enroll at the school is expected to remain at the school through the end of the school's educational program?

We expect approximately 60% of our students who begin with XSE the first year it opens to remain with us through the end of the school's educational program. As each subsequent year progresses, we expect that percentage to increase.

Describe any desegregation orders that apply and how the school will adhere to those orders.

Currently, there are no desegregation orders in effect. XSE will comply with any order should any become active.

Section N - Facilities

Describe the location of the school. If a specific site has been identified, describe the site and any facility the school will use. In an attachment, provide a diagram of the facility identifying classrooms, restrooms, offices, cafeteria, physical education and space for other uses (see Attachment D).

The location of the school will be in South Bend, IN. While no specific site has been identified, there are several potential buildings that ISE has looked at that could house the Xavier School of Excellence.

If the school is leasing or contracting with a church or religious organization, complete Attachment E. Note – A proposed policy for the use of religious facilities is under consideration as of the initial release date (November 9, 2007) of these requirements. Upon final adoption of that policy by the University, it will go into effect.

If the Xavier School of Excellence does locate a facility associated with a church or religious organization, Attachment E will be completed at that time.

List the total square footage of the facility as well as the square footage per student of classroom space.

While no specific site has been identified, it is estimated that we require approximately 30,000 square feet, with a minimum of 25 square feet of classroom space per student. See Attachment D for the Facilities Worksheet.

State whether the site and facility will be purchased, constructed, or leased. If the land and facility will be purchased, indicate the purchase price and total costs for renovations. If the facility is to be newly constructed, indicate the cost of the property and construction costs. If the property is to be leased, provide the name and business address of the owner and the terms of the lease, including monthly rent.

Given that a final site has not been identified, it has not been determined if the facility will be purchased or leased.

If no specific site has been identified, describe the plan for locating and acquiring a suitable site.

We are currently working with Allen Koch, CPM, of CB Richard Ellis, the largest commercial property broker in South Bend to identify and acquire a suitable facility. We are confident that one can be found within the required timeframe.

Describe the steps that are necessary to prepare the facility for opening. Provide a list of those steps with projected completion dates. Include the schedule for identifying the site and preparing it for the school opening.

While no specific site has been identified, we have several that are under consideration. Assuming a June, 2008 positive decision for our charter proposal, we expect to have a final decision by August, 2008, thereby giving us a full year to prepare the building for opening in August, 2009. As part of Attachment H, included in the Timeline for Startup, we have identified the estimated schedule to have the facility ready to open.

Section O - Transportation

Describe the plan for transporting students to and from the school, including provisions for transporting students with special needs. The plan must include a safe and secure environment.

The school will not provide any formal transportation for students. The parent or guardian will arrange transportation. Where possible, carpooling will be arranged for interested families.

Transportation for students with disabilities will be arranged for by their parent or guardian and approved by the school.

All parents and/or guardians must complete an Emergency Contact Sheet identifying who the student may or may not be released to. The parent/guardian must also notify the school immediately of any changes regarding that information. Students will at no time be released to anyone not listed on their Emergency Contact sheet as an authorized transporter by the parent or guardian, unless the school is notified by the parent/guardian prior to pick-up.

If the school will be using its own vehicles for student transportation, describe the vehicles and the routes that will be used to pick up and take students home each day, then enter the costs for that plan in the budget under transportation.

Given that the Xavier School of Excellence will not be providing transportation, this question does not apply.

If the school is not providing transportation, describe how the school will provide a safe location for drop-off and pick up of the students.

In the selection process for a facility, the board will consider the safety of the drop-off and pick-up area of each potential school location. Once a site has been selected, we will work with the City of South Bend to establish a plan to accommodate the expected number of students enrolled.

Section P - Satisfactory Reporting Relationships

Describe how the school will ensure that it meets the reporting requirements of Ball State University, the Indiana State Department of Education, and other federal, state, and local agencies.

One administrative person at the School will have the responsibility for assembling all relevant data and compiling reports due to Ball State University and the Indiana Department of Education. In addition, the assigned AQS regional manager will have responsibility to oversee and check the accuracy of the reports and the timeliness of their submission.

Section Q - Budget

Using the budget worksheets referenced on Attachment B, list all sources of the school's revenues and expenditures for the school's pre-operational startup phase through its fifth fiscal year of operation.

These budget worksheets are:

(A) Pre-operational budget worksheet, which should cover the time from your proposal being approved through June 30 of your first school year

(B) Cash flow analysis for the first fiscal year of school operation (July 1 – June 30)

(C) Cash flow analysis for the second fiscal year of school operation (July 1 – June 30)

(D) Income and expense summary for pre-operational period and the first five fiscal years of operation

Include any contributions of funds or in-kind donation of goods and services expected to be received by the charter school that will assist in evaluating the financial viability of the school. Only include those grants or in-kind donations that have been firmly committed. Provide copies of the written commitments. Provide a brief explanation of each grant or in-kind donation, including an estimated value for any in-kind services.

If there are plans to pursue certain grants or donations but have not yet received a commitment for these contributions, do not include them in the budget. Instead, provide a description of these potential contributions in a narrative. Include the source, estimated amount of the contribution, and expected date of receipt, if known. It is critical that the school define and give support for assumptions behind revenue and expenditure projections.

Describe in detail the contingency plans should the school experience a budget shortfall, low student enrollment, or other operational difficulties.

If in any given month, there is a small deficit experienced, expenses will be shifted or even eliminated to accommodate a balanced budget. If the school as a whole ever experiences a shortfall in expected revenue, the expenses will be adjusted to ensure a balanced annual budget.

Describe in detail the terms of all loans and provide amortization schedules for all loans.

Attachment B identifies all loans anticipated with expected terms.

Do not alter the income and expense descriptions in column A, even if the school chooses to recreate these documents. Where there will be no cost for an expense line, please place the number zero (0).

In the Education Management Organization (EMO) Budget (if applies), a minimum of 2% of each year's operating budget must be allotted for Board Members for insurance coverage and legal fees if the Education Management Organization (EMO) controls the revenue.

Section R - Recruitment and Admissions Procedures

Describe the marketing plan the school has for attracting students. Include the geographical region the school is targeting and the methods for contacting interested parents and students

The marketing plan for the Xavier School of Excellence will initially include the City of South Bend. However, the marketing will be extended into St. Joseph County if enrollment numbers are not satisfactory.

The marketing procedures for the Xavier School of Excellence will include:

1. An informational brochure mailed to households targeted to those with children.
2. Radio spots informing the community about the school with information for enrollment.
3. Scheduled community information meetings in various parts of the city.

Describe the recruitment and enrollment procedures the school will follow to ensure that the school is open to all students. If the school is oversubscribed at any grade, how will the school select the students to enroll? What will happen to students not selected?

All recruitment and marketing information will be distributed to every economic and geographic area of South Bend. This is to ensure that everyone recognizes that school is open to all students.

Our plan calls for the Xavier School of Excellence to begin with two sections of 25 students per section in each of grades K-5. Thus, the school would open with a total enrollment of 300 students. The second year, with the addition of Grade 6, enrollment will increase to 350 students. By the fourth year, the school's total capacity will be 450 students.

Enrollment decisions shall not be made until the advertised application process has been open to the public for at least three (3) weeks. Should applications for enrollment exceed available school capacity, a lottery will be held in an advertised public meeting by an independent third party, upon at least ten (10) days' prior written notice to the BSU OCS, to determine who will be admitted to the school. A representative from BSU OCS may attend the lottery drawing.

During the lottery, students are randomly selected to fill the seats available in each grade. Admission priority will be given to siblings of current XSE students. Students who are not selected through the lottery will be placed on a waiting list created at this public meeting. Applications received after the lottery shall be added to the end of the waiting list in the order received. If seats become available during the enrollment period, students will be admitted from the waiting list to fill the available vacancies.

Describe the record-keeping process the school will utilize to track students expressing an interest in the school, who apply to the school, who are selected, who enroll in the school, and who are not selected.

We will utilize a spreadsheet to track all students who express an interest in the school, by grade, and those who return a completed application. We will also track those applicants who enroll in the school, and those that do not, with space to record reasons for not enrolling.