



Dyslexia Program Strategy and Expansion

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Executive Summary

Our project is focused on assisting CAST (hereafter known as “the company”) by providing the foundations needed to expand the business into other counties while expanding the organizational hierarchy to include new administrative positions. In order to complete this foundation, we focused on four main areas of interest: Employment Expansion, Financial Overview, Promotion Strategy, and Regional Expansion.

Employment Expansion

Employment expansion contains two different areas: new roles for CAST as it grows and an updated organizational chart. Each role contains a list of responsibilities and hour requirements, with spaces for role descriptions and desired skills. The roles included are Private Tutors, DII Trainers, the Dyslexia Resource Center Coordinator, and the CEO. The organizational chart formally separates the two functional areas of the company into a volunteer focused division and a dyslexia focused division. We believe that this separation is effective due to the function and goals of each division.

Financial Overview

The financial overview focuses on two areas of revenue growth for CAST: revenues from its programs and corporate sponsorships. The dyslexia program includes the afterschool, private tutoring, and summer programs. By increasing the price for the private tutoring sessions, the company can minimize the funds that still need to be earned from outside sources such as corporate sponsorships. Considering CAST is centered in Southern Indiana, we recommend looking for corporations in Indiana to partner with, namely: Eli Lilly, Cummins, and Berry. Besides increasing funds, partnering with a corporation can also increase awareness of CAST.

Promotion Strategy

There are two main promotion strategies. One is to cooperate with Kelley Institute for Social Impact at Indiana University (KISI). Overall speaking, KISI has 12,650 hours served by students annually. KISI will post the weekly newsletter through email to students at Kelley about the company’s introduction and description of the volunteer activities. Another strategy is to work with IU Corps, which is the networking for Indiana University's students that focuses on bringing positive impact to society. IU Corps will post the company’s volunteer activities on Handshake, Facebook, Twitter, Instagram, and the Clock Tower.

Regional Expansion

One of the goals of CAST is to become a resource center for dyslexia services in southern Indiana beyond its current place in Washington County. The approach to regional expansion that we recommend is to provide regional training programs to enable school corporations in surrounding counties to create their own dyslexia tutoring programs. We have evaluated surrounding counties based on estimated profitability and average funding received to determine that Clark and Scott counties would be best for expansion.

Employee Expansion

CAST currently has one employee, Cassie, who covers all the company's operations while also developing the company's vision. Although she is currently able to meet the demands of the firm, as the company grows it will be harder for her to effectively manage the business without other employees. Our expansion plan creates several new positions complete with role specific job descriptions that create a separation of duties and a more efficient operational structure.

Separation of Duties

With Cassie being the only employee, issues revolving around separation can also arise. This can not only hamper the company's ability to receive funding from foundations but will also limit the effectiveness of Cassie and her work. As the only employee, Cassie organizes and schedules tutors, while also being responsible for paying them as well. In an ideal situation, these jobs will be separated to protect Cassie and the company from being accused of misappropriating assets. Separation of duties through new roles also provides the company with more efficiency. Instead of relying on Cassie for all the company's operations, the new roles will focus on leading the tutor and volunteer wings of the organization. This will let Cassie focus on building and maintaining the company's brand through marketing and fundraising.

New Roles for the Dyslexia Program

The roles highlighted in the PDF deliverables are associated with the Dyslexia program. Two roles will be created to assist this division in its operations: the Certified DII Trainer and Dyslexia Resource Center Coordinator. The DII trainer will be a hybrid employee that will work with both the Dyslexia Institute of Indiana and the company. Their primary role will be to train prospective tutors as CAST expands into new school districts. The Dyslexia Resource Center Coordinator is an administrative role designed to assist Cassie by organizing tutors to meet the demands of the students. They will schedule tutors and maintain their hours and material requisition lists for approval by Cassie in order to ensure that funds are being used appropriately. (**View attached PDF folder**)

Updated Organizational Chart

In order to formalize the new roles and the hierarchy of the company, we developed an organizational chart. The primary goal of reorganizing the corporate hierarchy is to separate the employees of the company and volunteer roles into two divisions to create a clear distinction: the Dyslexia program and the Volunteer division.

The Dyslexia program division is focused on training and organizing tutors to meet the needs of the different school districts and their students. The roles in this division will all be considered employees of the company, which requires more documentation and oversight when compared to volunteers. To meet the organizational needs of the tutors and trainers employed by the company, the Dyslexia Resource Coordinator will lead the division. They will report to Cassie for approval of payroll and material budgets and advocate for the tutoring programs at board meetings as needed.

The Volunteer division is focused on organizing company programs that are run and staffed by volunteers. The distinction from the Dyslexia program will improve organizational efficiency by creating a clear separation between employee roles and roles of volunteers. (**Appendix 1.1**)

Financial Overview

CAST utilizes different methods to generate funds including revenue from programs, donations, grants, and fundraisers. With the increasing costs from new employees and tutors, expanding the revenue sources will allow the company to continue to offer tutoring and mentoring services for students with training resources for teachers. This section will focus on the two areas of revenue growth for the company: programs and corporate sponsorships.

Revenue From Programs

The programs involving dyslexia are broken into three activities: After School, Private Tutoring, and the Summer of Success Reading Program. It is important to note that for each of the analyses, we assumed every student pays the full price (compared to part of it being subsidized by CAST).

1. After-School Program

The After-School Program's expected revenues and costs can be found below:

Revenues	
Semester Rate	\$ 50
Students	
Salem	20
East Washington	20
West Washington	0
Total	40
Total Revenue	\$ 2,000

Expenses	
Tutor Rate	\$ 25
Tutors	5
Weeks	30
Hours Per Week	2
Total Tutor Expenses	\$ 7,500
Materials	\$ 500
Marketing	\$ 50
Total Expenses	\$ 8,050

Overall Outlook	
Total Revenues	\$ 2,000
Total Expenses	\$ 8,050
Profit / (Loss)	\$ (6,050)

CAST has previously used a semester rate of \$50 per student. Based on the expected number of students of 40, would earn \$2,000 in revenue. The company will incur costs of \$7,500 assuming five tutors will be employed at \$25 an hour. After adding other costs such as materials and marketing, the total expenses equal \$8,050. This results in a \$6,050 loss for the after-school program which will be supplemented by other revenue sources.

2. Private Tutoring Program

The Private Tutoring Program's expected revenues and costs can be found below:

Revenues	
Session Rate	\$ 20
Weeks	30
Sessions Per Week	2
Students	
Salem	10
East Washington	5
West Washington	5
Total	20
Total Revenue	\$ 24,000

Expenses	
Tutor Rate	\$ 25
Tutors	5
Weeks	30
Hours Per Week	8
Total Expenses	\$ 30,000

Overall Outlook	
Total Revenues	\$ 24,000
Total Expenses	\$ 30,000
Profit / (Loss)	\$ (6,000)

Based on the session rate of \$15 per student, an expected number of students of 20 and 2 weekly sessions for 30 weeks, the company would earn \$18,000 in revenue. With an expected number of

tutors of five earning an hourly rate of \$25 at 8 hours a week for 30 weeks, the company would incur \$30,000 in expenses. With these expected revenues and costs, the private tutoring program incurs a loss of \$12,000. If the company increased the session rate to \$20, it could increase its revenue to \$24,000, reducing the loss to \$6,000.

3. Summer of Success Reading Program

The Summer of Success Reading Program expected revenues and costs can be found below:

Revenues	
Weekly Rate	\$ 50
Weeks	4
Students	
Session 1	15
Session 2	15
Total	30
Total Revenue/Session	\$ 6,000

Expenses	
Counselor Rate	\$ 15
Counselors	2
Hours	48
Total Counselor Expenses	\$ 1,440
Teacher Rate	\$ 25
Teacher Hours	96
Total Teacher Expenses	\$ 2,400
Supplies	\$ 500
Total Expenses/Session	\$ 4,340

Overall Outlook	
Total Revenues	\$ 12,000
Total Expenses	\$ 8,680
Profit / (Loss)	\$ 3,320

Based on the weekly rate of \$50 per student, an expected number of students of 30, and sessions lasting four weeks, the company would earn \$6,000 in revenue for each session. It is expected that two counselors will work in this program at an hourly rate of \$15. They will work 48 hours over the sessions, incurring \$1,440 in expenses for the company. In addition to counselors, this program also includes a teacher who will earn \$25 per hour for the 96 hours in the program. This incurs \$2,400 in additional expenses for the company. After adding costs, such as supplies needed, total expenses equal \$4,340 for one session. With two sessions, the after-school program earns a profit of \$3,320.

Overall, from the financial breakdowns of the OG programs, \$8,730 will be needed from outside revenue sources.

Corporate Sponsorships

In addition to earning funds from the programs, CAST can also engage with corporations through sponsorships. The following companies are headquartered in Indiana which partner with organizations like CAST:

1. Lilly Endowment

The Lilly Endowment was created in 1937 to help support and promote educational or charitable purposes. While its founders gifted the Endowment with stock of Eli Lilly to create it, the non-profit remains a separate entity to Eli Lilly and should not be confused with the Lilly Foundation which is affiliated with the company. During 2020, the Lilly Endowment paid \$773.2 million in grants, 30% of which were education grants. One example is its investment in Early Learning Indiana, which focuses on helping early year students. showing the Endowment's interest in collaborating with educational organizations that help families and students gain access to resources.

The Lilly Endowment looks for organizations that strengthen elementary and secondary education by preparing students for both school and careers in the future. It gives priority to organizations that improve the quality of life of people in Indiana, especially related to education.

To apply, organizations send a letter that is no more than two pages long through mail (emails and calls will not be considered) with the information below:

- Organization information
- Project in mind
- Issue or need to be addressed
- Amount of support needed

The Endowment's Board of Directors consider the grant proposals in March, June, September, November, and December. This process can take 3-6 months after which they will provide a written response with their decision.

2. Cummins Foundations (Cummins)

The Cummins Foundation was created in 1954 and has provided grants around the world where its employees reside. In 2020, \$22 million in community grants were awarded. To be eligible to receive a grant, the organization must have the status as exempt from federal income tax through the Form(c)3 and must not be a medical organization, religious activity, political campaign, or projects or services that could benefit Cummins.

The application process does not allow any unsolicited external requests. Instead, an employee engages with an organization and submits a grant request on behalf of that organization. For CAST to work with this organization, it must interact with a Cummins employee.

3. Berry Global Contributions Program (Berry)

The Berry Global Contributions Program donates to charities through matching its employees' donations (if the matching guidelines are met, and the donation is submitted through the portal) and through direct donations. Organizations must be qualified as federally tax exempt through the Form(c)3 and cannot be a religious or political organization or engage in discriminatory practices. Priority is given to organizations in Evansville, Indiana but this is not a requirement for a request to be approved. In addition, the Contributions Programs look to provide resources to organizations that help economically disadvantaged citizens.

To apply, the non-profit can fill out an online form with information such as the organization name and contact info description, category (CAST would fall into the youth and education categories), event description, and the amount requested. Any supporting documentation can also be attached to the form such as the Form 501(c)3, W-9, or any event/sponsorship details.

By increasing the revenue from the various programs and interacting with corporate sponsors, CAST can increase its funds available and increase the general public's awareness of the organization as well.

Promotion Strategy

Cooperating with KISI and IU Corps at Indiana University are the promotion strategies we believe can increase volunteer numbers, awareness, and company reputation. We also include future promotional expansion strategies for CAST at the end of this section.

Working with KISI

The Kelley Institute for Social Impact offers programs and courses that encourage students to think broadly about the impact of their work on the local community and the world. They partner with nonprofits and corporations to provide students with opportunities to discover meaningful careers.

KISI's mission is to empower socially conscious students to make a difference in local and global communities through education, service, career development, and leadership opportunities. It works on building a community of courageous people actively engaged in providing a positive, sustainable impact on society. According to KISI, there were 12,650 hours served by students annually. This provides the company with enormous potential for attracting talent.

KISI has already posted the company's volunteer activities on November 2nd to all the students at Indiana University. It included both an introduction of CAST and the volunteer opportunity description in the newsletter (**Appendix 2.1**). According to the conversation with the representative at KISI, they will continue to send out the information about CAST in the future.

Working with IU Corps

IU Corps is a network of IU students, campus stakeholders, and community partners who have joined forces to create positive social change in local neighborhoods. According to IU Corps, there are over 230 organizations providing service on or off-campus with over 270 volunteer opportunities available every year.

IU Corps will post the company's volunteer activities on Handshake, Facebook, Twitter, Instagram, and the Clock Tower. Besides posting the information, IU Corps will connect the company with the director of the education department at Indiana University, which can help the company explore opportunities to work with faculty at Indiana University. The representative believes the faculty at the education department will need CAST's help while providing volunteer hours for the company.

Indiana University students attending the volunteer activities at CAST not only help more children and families, but they also gain the opportunity to learn how to educate and train students who need help in reading. Therefore, the company's volunteer opportunity is a fantastic opportunity for university students, especially those who major in education, psychology, and nursing.

Sustainable Expansion Strategy

Besides cooperation strategies, we also considered sustainable strategies that will help the company grow in the long term.

We recommend the company launch parent-related activities, such as holding presentations to parents to introduce the nature of dyslexic learning, the knowledge of basic assessment measures, the signature of dyslexia, and the social impacts of dyslexia.

Another future consideration we have for the company is to provide arts, creativity, and life-skill resources. To be more specific, the company can train children in communication, critical thinking,

teamwork, and self-direction. The company will be differentiated by providing richer resources, and parents will be satisfied with the training that helps their children grow in all aspects, not just school.

We also want to focus on the resources provided to people in CAST and those who have not joined CAST yet. For example, CAST can upload their videos to YouTube to make more families know about its existence.

The last future consideration we recommend for the company is to provide online programs. Due to COVID, people have started to work and study virtually. The company can switch the dyslexia program, after-school program, private tutoring program, and summer program from in-person to online for those students who do not feel comfortable in person. Even though people start to get vaccines, most children cannot get vaccines because of their age. Therefore, we recommend the company prepare for the online program transformation. On the other hand, instead of complete transformation, the company can hold online activities such as online speech about the dyslexia that families need to know. Since online activities are more accessible for people, especially the parents who have children to take care of, we believe that online activities will make more awareness of the company in the industry.

Regional Expansion

The final part of the Dyslexia Intervention Plan we address is for CAST is to become a dyslexia resource center for Southern Indiana. In order to accomplish this, the company needs to find a way to provide dyslexia tutoring services for students in the surrounding counties. To help the company accomplish this, we have examined multiple potential strategies, including partnering with similar organizations in those counties and setting up tutoring services in each county. Ultimately, we concluded that the best option for regional expansion is for the company to provide regional training for teachers.

Regional Trainings for Teachers

We believe that the best approach for CAST is to provide regional training programs for teachers. Initially we plan to do this by partnering with DII. They will provide the training services until we have employees licensed to take over. While DII is aiding in providing the training services, we anticipate a 60/40 revenue split with them as they will be covering the costs of the trainer.

Providing regional training programs will enable school corporations in Southern Indiana to set up their own dyslexia tutoring programs. This means that the company will be able to have a greater impact on students in need since they will be able to reach a greater number of students more quickly. This easier expansion provided by this strategy will also enable the company to expand beyond contiguous counties of Washington County.

The plan to provide regional training for teachers will help the company by expanding into other counties while maintaining the costs. One of the biggest drawbacks of other expansion plans, like setting up our own tutoring services, is that the immediate costs of implementing the plan would be high. To do this, the company would need to hire and train additional employees as well as pay for facilities to use. Providing regional training helps mitigate these costs since they will be initially covered by DII and are expected to be lower overall once the company is covering these costs.

Areas to Prioritize

While the plan to provide regional training programs allows for more flexibility with expansion, we wanted to help CAST identify counties to prioritize when deciding where to start these training programs. To do this, we ranked each county based on the revenue that we expect to generate there as well as the average funding that each student receives from the county. We then took the average of these rankings so that both categories were weighted with equal importance (**Appendix 3.1**). Based on these results, we recommend prioritizing expansion into the Clark and Scott counties.

Funding Per Student

The first criteria that we used to evaluate the potential expansion areas was the average funding per student in each county. To determine the average funding that a student in each county receives on an annual basis, we averaged these amounts from each school corporation in a particular county. The funding for each school corporation was taken from a study on school funding equitability done by Adam McCann (**Appendix 3.2**).

Estimated Revenue per County

The second criteria that we used to evaluate the potential expansion areas was the revenue that we estimate CAST will be able to generate in each county. To estimate this amount, we first calculated the expected number of students in each school system with dyslexia. To find this number, we used the school district size published by the U.S. Census Bureau and multiplied it by 10% (the estimated percentage of students needing dyslexia tutoring). We then adjusted this number to represent students in kindergarten through 2nd grade and divided the number of students by the average class size of 21. This gave us the expected number of teachers that each school corporation would need to train. Finally, we multiplied the expected number of teachers by \$1,800 (the amount charged by DII) to find the revenue per school system and calculated the revenue for each of the counties (**Appendix 3.3**).

After analyzing both the funding per student and the estimated revenue expected, we recommend starting with Scott and Clark County.

Performance Metrics

Throughout CAST's growth in its employees, revenues and expenses, promotional strategies, and expansion into other counties, we identified key performance indicators for CAST to use to determine its effectiveness.

Financial Overview

To remain a sustainable organization, it is imperative for CAST to earn enough funds to cover all the expenses. While the main programs do not need to earn a profit, the revenue from outside sources such as the corporate sponsors, grants, donations, and fundraisers should cover these expenses and any other miscellaneous ones.

Promotion Strategy

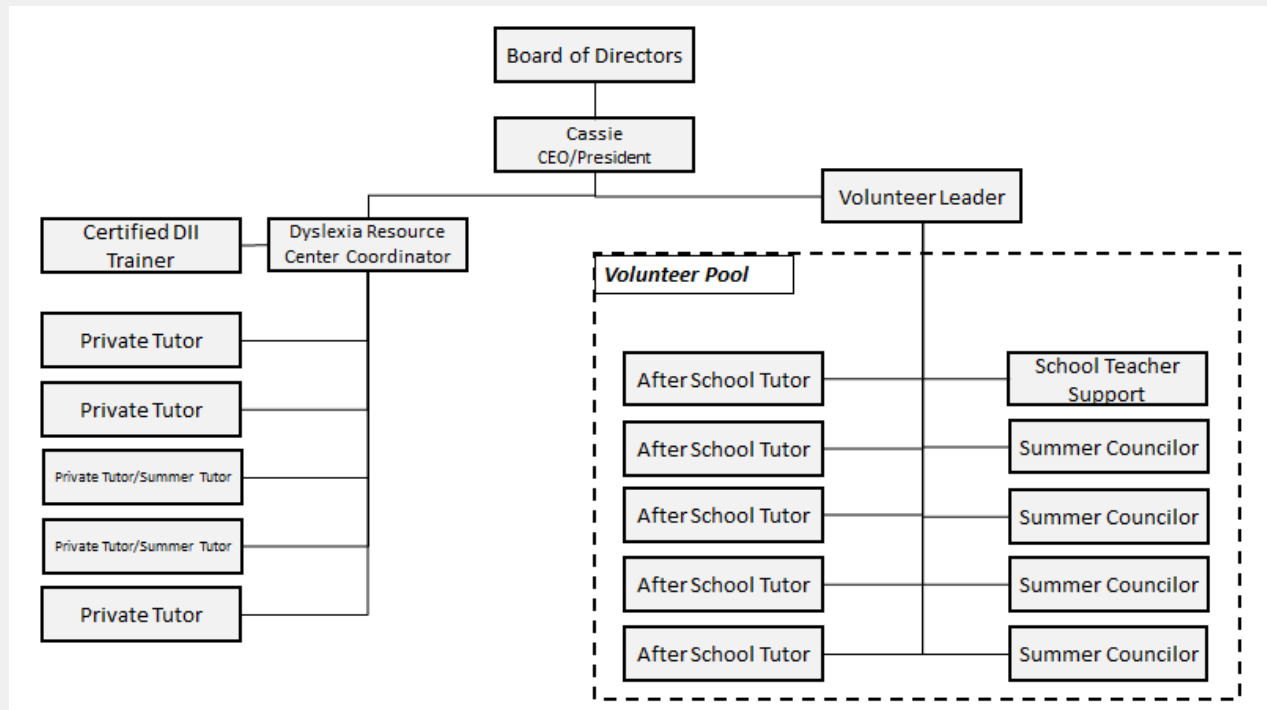
The method for the company to evaluate the success of promotion strategies is doing surveys. CAST can ask future volunteers questions about how they hear about the volunteer opportunities. If they hear the opportunities from IU KISI and IU Corps, the promotion strategy is successful. At the same time, they can ask parents about feedback, and it is an excellent sign if they mention the strategy in the promotion section. At the same time, CAST can continue to improve the services based on feedback.

Regional Expansion

We identified several measures that would be useful to help determine the success of the expansion strategy and identify any areas of improvement. The first is to monitor the number of school corporations sending teachers to the sessions which will give the company a better understanding of the areas they are impacting, and which ones are still in need. Additionally, it would be useful for the company to monitor the retention rate for the school that are sending teachers to the training sessions. This will help the company to understand if the schools find the training useful. The third measure we recommend keeping track of is the number of attendees per session which shows the demand for the services and if any adjustments need to be made to the frequency of the sessions.

Appendix

Appendix 1.1



Appendix 2.1

KISI Weekly Newsletter

VOLUNTEER OPPORTUNITIES

CAST

Through tutoring and mentoring opportunities, CAST seeks to encourage students in Washington County to become contributing citizens who develop a lifelong passion for learning. CAST is currently working to establish the Southern Indiana Dyslexia Resource Center to support struggling readers and their families and teachers.

Volunteer Opportunities:

1. After School Program: In person or virtual homework help for middle school students.
2. Orton-Gillingham Tutor (must have OG Reading Specialist training or be willing to attend 40 hr training): One-on-One or small group reading tutoring

Contact Information:
 CAST, Inc
 1707 N Shelby St
 Suite # 107
 Salem, IN 47167

Email: castwashco@gmail.com
 Website: www.castwashco.org
 Phone: 812-620-7907

Appendix 2.2

The Clock Tower

Volunteer Opportunities



ONGOING OPPORTUNITY, remote

[CAST, Inc. Southern Indiana Dyslexia Resource Center: Orton-Gillingham Reading Specialist Tutors](#)

After successfully completing a summer course in virtual Basic Orton-Gillingham training, you'll be matched with a local student as a virtual tutor for the 2022 school year. Potential employment opportunity available after training.

Appendix 3.1

County	Rank
Clark	1
Scott	1
Harrison	3
Floyd	4
Martin	5
Dubois	6
Lawrence	7
Jackson	8
Crawford	9
Orange	10

Appendix 3.2

County	Average Funding per Student
Harrison	\$9,095.00
Martin	\$9,518.00
Clark	\$9,670.67
Scott	\$10,031.50
Crawford	\$10,109.00
Floyd	\$10,164.00
Dubois	\$10,202.50
Lawrence	\$10,678.00
Orange	\$10,806.00
Jackson	\$10,974.75

Appendix 3.3

