



Re: Sample output evaluation?

From Allan Bell <allan@urnuvu.com>
Date Fri 9/4/2026 1:52 PM
To Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>
Cc BJ Lippert <blippert@cpadonovan.com>

Thanks, Shaina! And no worries...I'll look at this information right away and get you insight early next week. I hope you enjoy the holiday weekend!!!

Allan Bell - CPA, CMA, MBA
Founder & CEO
NuVu Advisory Services
E:allan@urnuvu.com
C:252.294.7644
From Data to Decisions: The **NuVu** Way



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From: Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>
Sent: Friday, September 4, 2026 1:28 PM
To: Allan Bell <allan@urnuvu.com>
Cc: BJ Lippert <blippert@cpadonovan.com>
Subject: Re: Sample output evaluation?

Hey Allan,

I apologize for the delay here. Our finance analyst put together a report from our salesforce data, with some notes about limitations. I'm also including some submitted unaudited financials of Donovan clients, audits, and some of our reports.

This page on our website has a full list of schools and a full posting of every finance report (CQ2), if you want more data to work with. I'm hoping these things together get you the information you need. Happy to talk more once you've had a chance to work with the data. Again, I'm sorry it took so long.

Shaina Cavazos
Director, Office of Education Innovation
Office of the Mayor — City of Indianapolis
O: 317.327.3111 C: 630.440.5067
Shaina.Cavazos@Indy.Gov
[Book a meeting with me](#)

On Aug 21, 2026, at 3:23 PM, Allan Bell <allan@urnuvu.com> wrote:

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Hi Shaina,

Hope all is well. I wanted to follow up on our previous conversation and see if there's anything I can provide or help with as you work to pull together the data we'll use to train and build out the model.

Please let me know if there's anything I can do to make the process easier.

Thanks,
Allan

Allan Bell - CPA, CMA, MBA

Founder & CEO

NuVu Advisory Services

E:allan@urnuvu.com

C:252.294.7644

From Data to Decisions: The **NuVu** Way

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From: Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>

Sent: Monday, August 10, 2026 11:10 AM

To: Allan Bell <allan@urnuvu.com>

Cc: Sikand, Angad <Angad.Sikand@indy.gov>; BJ Lippert <blippert@cpadonovan.com>; Morgan, Holly M. <Holly.Morgan@Indy.Gov>

Subject: Re: Sample output evaluation?

Hi Allan,

I can meet — if you want, please schedule 30 minutes using the booking link in my signature.

Thank you!

Shaina Cavazos

Director, Office of Education Innovation

Office of the Mayor — City of Indianapolis

O: 317.327.3111 C: 630.440.5067

Shaina.Cavazos@Indy.Gov

[Book a meeting with me](#)

On Aug 5, 2026, at 10:07 AM, Allan Bell <allan@urnuvu.com> wrote:

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Hi Angad,

It's nice to meet you as well. Thanks for your response and my apologies for the slow response - I was traveling out of the country. I look forward to connecting when the time is most convenient for the team.

Thanks,

Allan

Allan Bell - CPA, CMA, MBA

Founder & CEO

NuVu Advisory Services

E:allan@urnuvu.com

C:252.294.7644

From Data to Decisions: The **NuVu** Way

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From: Sikand, Angad <Angad.Sikand@indy.gov>

Sent: Thursday, July 30, 2026 2:00 PM

To: BJ Lippert <blippert@cpadonovan.com>; Allan Bell <allan@urnuvu.com>

Cc: Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>; Morgan, Holly M. <Holly.Morgan@Indy.Gov>

Subject: RE: Sample output evaluation?

Good Afternoon BJ,

Thank you so much for the introduction.

Allan —it's a pleasure to "e-meet" you and learn more on the development of this tool for the greater Indiana Charter Community.

Could we circle-back with you next week on the availability of our team? My expertise lies in the school finance area and would require additional members of the OEI Team to be present in order to best answer your questions. Several members of the team are absent until mid-next week and will need additional coordination with upcoming meetings with schools.

Please let us know you have any immediate questions and will be in-touch shortly with the availability of our team.

Best,

Angad Sikand

Sr. Financial Performance Analyst

Office of Education Innovation | City of Indianapolis

Angad.Sikand@indy.gov | 0:317-327-5179

From: BJ Lippert <blippert@cpadonovan.com>

Sent: Thursday, July 30, 2026 11:34 AM

To: Sikand, Angad <Angad.Sikand@indy.gov>; Allan Bell <allan@urnuvu.com>

Subject: Re: Sample output evaluation?

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This is very helpful, Angad. Thank you.

Please allow me to introduce to you Allan Bell (copied). Allan is the brains behind the charter school AI data model we are building.

I shared the accountability reports with Allan in the hopes that we could recreate those reports within the model to help save you time gathering information in order to free up time to analyze the information.

Allan had questions about some of the metrics and scoring within the reports that require some subjectivity. Would you be willing to spend 20 minutes on a phone call with us to help us better understand how some of the non-financial scores are determined?

Thanks again for all of your help with this! Each step forward is one step closer to something that can really help OEI and the entire Indiana charter school community.

All the best,

BJ

Benjamin (BJ) Lippert, CPA

Managing Partner

317.794.3983 (Direct)

317.844.8300 (Office)

317.457-5171 (Cell)

www.cpadonovan.com

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From: Sikand, Angad <Angad.Sikand@indy.gov>

Sent: Wednesday, July 22, 2026 2:00 PM

To: BJ Lippert <blippert@cpadonovan.com>

Cc: Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>; Morgan, Holly M. <Holly.Morgan@Indy.Gov>

Subject: RE: Sample output evaluation?

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Good Afternoon BJ,

Attached are examples of OEI's Evaluation for each authorized charter school based on the four areas/questions that make-up the overall Mayor's Performance Framework and [can be found on our website](#):

- Core Question 1: Academics (Is the educational program a success?)
- Core Question 2: Finance (Is the organization in sound fiscal health?)
- Core Question 3: Governance (Is the organization effective and well-run?)
- Core Question 4: Operations/Site-Visit (Is the school providing the appropriate conditions for success?)

OEI measures each school within its portfolio's performance individually based on ratings assessed to the overall indicators within each Core Question Report. As a school reaches the end of its current charter contract term with OEI, the school is invited to renew with our office and charter renewal decisions are based on the ratings assessed over the course of its charter term.

Please let us know if you have any additional questions.

Best,

Angad Sikand

Sr. Financial Performance Analyst

Office of Education Innovation | City of Indianapolis

Angad.Sikand@indy.gov | 0:317-327-5179

From: BJ Lippert <blippert@cpadonovan.com>

Sent: Tuesday, July 21, 2026 12:09 PM

To: Cavazos, Shaina R. <Shaina.Cavazos@Indy.Gov>; Sikand, Angad <Angad.Sikand@indy.gov>; Morgan, Holly M. <Holly.Morgan@Indy.Gov>

Subject: Sample output evaluation?

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Good afternoon, OEI Team,

As a follow-up to our earlier discussion, are you willing to share a sample output evaluation your office uses to score the schools it authorizes? We are going to use our AI tool to recreate the scorecard using the evaluation criteria on OEI's website. By having a sample, this will enable us to ensure that everything is captured and recreated properly.

Thanks in advance for sending a sample. We are getting closer to something that could be very helpful to OEI and other authorizers throughout the state.

All the best,

BJ

Benjamin (BJ) Lippert, CPA

Managing Partner

317.794.3983 (Direct)

317.844.8300 (Office)

317.457-5171 (Cell)

www.cpadonovan.com

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