Charter School Application

Providing high-quality educational opportunities
for students in the state of Indiana

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Application Introduction

A charter school is a public school that operates under a contract, or charter, entered into between the school's organizer and a charter school authorizer. Charter schools are established to provide innovative and quality choice options to serve the needs of the community. Education One at Trine University currently authorizes 11 schools in Fort Wayne, Gary, Indianapolis, South Bend, and Springville, Indiana.

Education One has developed an Application Process Protocol for all schools seeking authorization. The application process has seven major components: (1) Letter of Intent; (2) Initial Proposal; (3) Application Invitation; (4) Application Review; (5) Public Hearing; (6) Proposed School Board Meeting; and (7) Acceptance or Denial of Application. Education One follows an open application cycle. However, recommended guidelines for submission have been outlined to support quality school start up.

Education One is governed by its own board of directors separate from Trine University. The Executive Director makes a recommendation to the Education One Board of Directors regarding the acceptance or rejection of an application. The Education One Board of Directors meet and vote to accept or reject the application, based on the recommendation.

The application questions are organized to solicit information efficiently and to aid quality review and decision making by the Education One Application Review Team. Education One staff reserves the right to reject applications that do not adhere to the application specifications. Throughout the process, Education One staff will communicate important information to the charter school applicant's authorized representative.

Applicants who should use this application are those who are applying to open a new charter school. Existing charter schools applying to replicate their school(s) should complete the application as well as items marked for replication.

Education One utilized resources found from the National Association of Charter School Authorizers (NACSA) to create this comprehensive charter school application. Information regarding NACSA and its resources can be found at www.qualitycharters.org.

Applicant Submits Letter of Intent:
Recommended Timeline for Submission: One Year Prior to Start of School
Interested candidates must submit a Letter of Intent to the Executive Director of Education One describing their desire to establish a school in conjunction with Education One. This Letter of Intent must also describe basic tenets of the proposed school structure, such as location, opening date, age range of students, and curriculum and management structures.

Applicant Submits Initial Proposal:
Recommended Timeline for Submission: One Year Prior to Start of School
Following the submission of a Letter of Intent, an applicant will submit an Initial Proposal, describing the structure of the proposed school. The Initial Proposal must include a Vision and Mission statement for the school, a justification of the school's expected effectiveness at enhancing the educational achievement of its students, and an in-depth description of the curriculum and management structures of the school. Specifically, the school's educational model must be stated, its curricular framework must be established in which specific educational objectives for each subject taught at the school are stated, and assessment procedures should be explained. Additional pages may be submitted with information regarding the applicant's ideas of innovation in education, if applicable.

Review/Feedback of Initial Proposal by Executive Director (Q & A):
Members of the Education One staff will review all Initial Proposals, utilizing a rubric to score each section. Additional questions may be asked as needed. As a courtesy to the applicant, the Executive Director will provide verbal feedback to the applicant based on the review of the Initial Proposal. Selected applications will then be invited to submit an Application. Application submission is by invitation only.

Applicant Submits Full Application and Participates in Capacity Interview:
Recommended Timeline for Submission: At Least Nine Months Prior to Start of School
Following the invitation to apply, applicants submit a full application to Education One. All completed applications are reviewed using a rubric by the Application Review Team consisting of Education One staff members, Education One's Finance/Facilities Consultant, and independent consultants with expertise in the proposed school's educational model. Legal counsel will also review applications, when necessary, at the request of Education One's Executive Director.

After an initial review of the application, the Executive Director will provide initial written feedback from the Application Review Team to the applicant. The applicant will have time to review the feedback and make any changes to the application they deem necessary. Revised applications will be resubmitted for review to the Application Review Team. The same rubric will be utilized to rescore the application as needed.

Application Specification and Submission Instructions
- The application must be typed and single-spaced utilizing the template provided by Education One. Utilize the provided text boxes, with a minimum of 11-point font, to answer application questions. If a particular question does not apply, respond with a "Not Applicable." Questions without text boxes indicate that the response will be incorporated into an application attachment.
- The application narrative should not exceed 75 pages. For replication schools, the narrative should not exceed 100 pages. Attachments do not count toward the page limit.
- When submitting resumes, please label each document with the individual's affiliation with the proposed school (i.e., Founding Group Member, Board Member, School Leader, Teacher, etc.).
- Complete all pages of the Financial Plan and Charter Application Budget and Staffing Workbooks.
- Review your application for completeness before submitting. Each subsection provides a list of what should be included in an answer(s) to meet expectation standards.
- Upload a complete copy of the application as one PDF in your Application folder.

Following the final scoring of the written application, the applicant will meet with the Application Review Team for an Application Capacity Interview. The interview may include members of the Applicant Team, including but not limited to the proposed school's Governing Board, school leadership team, and proposed staff members. The interview will gauge the applicant's capacity to execute the components outlined in the submitted application, in regards to academics, organization, and finances. The Application Review

Team will debrief after the interview. If further questions exist, or additional clarification is needed, an applicant may be invited to a second interview with the Application Review Team.

School Board Meeting
Recommended Timeline for Submission: At Least Nine Months Prior to Start of School
Prior to recommending approval of an application, the Executive Director will attend a board meeting for the proposed school in order to monitor and measure the board's capacity to govern the proposed school in accordance with Education One's board governance skills matrix, which includes skills associated with business, community engagement, education, finance, and legal.

Public Hearing
Recommended Timeline for Submission: At Least Nine Months Prior to Start of School
Prior to recommending approval of an application, a public hearing will be scheduled. During the Public Hearing applicants will present their proposal to the community in a public forum. Applicants will be asked to answer questions from the Education One team, as well as members of the public. Opportunities for members of the public to speak in opposition or in favor of the proposed school will be given. Education One will also accept written forms of support/opposition from the public.

Education One Board Meeting
Recommended Timeline for Submission: At Least Eight Months Prior to Start of School
The Executive Director will make a recommendation to the Education One Board regarding the acceptance or rejection of an application. The Education One Board of Directors will meet and vote to accept or reject the application, based on the recommendation. Applicants will be notified of the Board's decision within 24 hours of the vote.

Notice of Disclosure

All information submitted as part of the application (including financial information) is subject to the Indiana Access to Public Records Act (IC § 5-14-3) and subject to disclosure to the public there-under, including disclosure to the media. **In the event that it is the applicant's position that certain information submitted as part of the application falls within an exception to disclosure under the Public Records Act, the applicant must obtain an advisory opinion from the State of Indiana's Public Access Counselor prior to submitting any application materials**. If the Public Access Counselor's opinion supports the applicant's position, then any such information contained in the application that is considered non-disclosable must be clearly identified in the application as confidential. The application must further be accompanied by (a) a written statement specifying the particular exception or exceptions to disclosure under the Public Records Act applicable to the information sought to be exempted from disclosure, and (b) the written opinion from the Public Access Counselor that supports the applicant's position that the information is exempt from disclosure under the Public Records Act.

The applicant acknowledges that if the foregoing procedure is not followed, and an application is submitted, all information shall be subject to disclosure to the public unless Education One, L.L.C. determines that it must withhold from disclosure certain information in the application pursuant to the Public Records Act. Each applicant, by the submission of an application, acknowledges its understanding that all application materials are subject to disclosure under the Public Records Act and may be subject to review and copying by the public. Each applicant and its representatives, employees and agents acknowledges and agrees that Education One, L.L.C. Board members and staff, Trine University, the Indiana Department of Education, and any official, agent, employee or representative of the State of Indiana shall not be held liable or legally responsible in any way for any such disclosure pursuant to the Public Records Act, and such parties hereby waive any rights to redress or claims of action pursuant to any such disclosure.

APPLICATION ATTACHMENTS

Education One utilizes Google Drive to organize each applicant's application and the required attachments, found in the table below. Each applicant group will have access to a Google Drive Folder that will include all the necessary templates to complete their application. A folder, titled "Application Attachments," will be used to save attachments in the following manner:

- Each applicable attachment for the school should be saved as one PDF and uploaded to the Application Attachments folder.
- Each attachment should be saved as the attachment number (i.e., Attachment 1, Attachment 2, etc.).
- Link each attachment to the table below, following these steps:
  - Right click on the attachment PDF saved in the Application Attachments folder.
  - Click "Get shareable link."
  - Click the drop down arrow next to "Restricted" and choose "Anyone with the link."
  - On the right, make sure "Viewer" is chosen.
  - Click the blue "Copy Link" button.
  - Paste the link into the table.
  - Add a space after the link to activate for viewers to click and be directed to the attachment.

Application Attachment Table		
Attachment	**Description**	**Link**
Attachment 1	**Planned Curriculum** *Provide a sample course scope and sequence for one subject for one grade level for each division (elementary, middle, high) the school would serve.*	Attachment 1
Attachment 2	**Plan for Development of Program** *Provide a plan for how the program will be developed between approval and opening, including the person responsible and key stages for completion.*	N/A
Attachment 3	**Exit Standards for Graduation** *Provide the school's exit standards for graduating students from the last grade served by the school.*	Attachment 3
Attachment 4	**Proposed School Calendar** *Provide the proposed school calendar for the first year of operation, including the number of days/hours of instruction.*	Attachment 4
Attachment 5	**Proposed Daily & Weekly Schedules** *Provide a sample daily and weekly schedule for each division (elementary, middle, high school) of the school.*	Attachment 5
Attachment 6	**Enrollment Policy** *Provide the school's proposed enrollment policy.*	Attachment 6
Attachment 7	**Discipline Policy** *Provide the school's proposed discipline policy.*	Attachment 7
Attachment 8	**Evidence of Community Support** *Provide evidence of support from community partners (i.e., letters of intent/commitment, memoranda of understanding, and/or contracts).*	Attachment 8
Attachment 9	**Principal/School Leader Information** *Provide the resume for the proposed principal/school leader.*	Attachment 9
Attachment 10	**Principal/School Leader Posting Information** *Provide the job description or qualifications for this position with a discussion of the timeline, criteria, and recruiting/selection process for hiring.*	Attachment 10
Attachment 11	**Additional Leadership Team Information** *Provide the qualifications, resume, and professional biography for any identified leadership team members.*	Attachment 11

Attachment 12	**Non-Profit Status Proof/Board Policies** *Submit Articles of Incorporation, proof of non-profit status and tax exempt status (or copies of filings), and any governing documents already adopted.*	[Attachment 12](#)
Attachment 13	**Signed Statement of Assurances** *Submit one completed and signed Statement of Assurances on behalf of the board. Use the template provided by Education One.*	[Attachment 13](#)
Attachment 14	**Organizational Charts for Governing, Managing & Staffing** *Submit an organization chart that shows school governance, management, and staffing structure for Year 1 and at full build-out.*	[Attachment 14](#)
Attachment 15	**School's Governing Board** *List the members of the school's proposed leadership team and governing board. Include full resumes that contain contact information for each individual listed.*	[Attachment 15](#)
Attachment 16	**Board Member Notice of Disclosure** *Submit completed and signed information sheets for each board member. Use the template provided by Education One.*	[Attachment 16](#)
Attachment 17	**Board Code of Ethics & Conflict of Interest** *Provide the board's proposed Code of Ethics and Conflict of Interest policy.*	[Attachment 17](#)
Attachment 18	**Term Sheet for Contract** *Provide the term sheet, draft proposed management contract detailing limits and evidence that the service provider is authorized to do business in Indiana.*	[Attachment 18](#)
Attachment 19	**Complete Staffing Chart for School** *Provide a complete staffing chart with Year 1 positions, administrative, instructional, and non-instructional personnel, the number of classroom teachers, paraprofessionals, and speciality teachers, and operational/support staff.*	[Attachment 19](#)
Attachment 20	**Personnel Policy/Employee Manual** *Provide a personnel policy or an employee manual if developed.*	[Attachment 20](#)
Attachment 21	**Leadership Evaluation Tool** *Provide leadership evaluation tools that have been developed.*	[Attachment 21](#)
Attachment 22	**Teacher Evaluation Tool** *Provide teacher evaluation tools that have been developed.*	[Attachment 22](#)
Attachment 23	**Proof of Secured Facility** *Provide proof of commitment for the facility.*	[Attachment 23](#)
Attachment 24	**Facility Description** *Provide supporting documents that detail the facility (10 page limit).*	N/A
Attachment 25	**Start-up Plan/Timeline** *Provide a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.*	[Attachment 25](#)
Attachment 26	**Insurance/Levels of Coverage** *Provide a list of the types of insurance coverage the school will secure, including a description of the level of coverage.*	[Attachment 26](#)
Attachment 27	**Implementation Schedule** *Provide an implementation schedule that explains the strategy for executing each charter that is approved. Use the template provided by Education One.*	N/A
Attachment 28	**Completed Budget and Staffing Workbook** *Use the workbook provided by Education One.*	[Attachment 28](#)

Attachment 29	**Budget Narrative** *Provide a detailed description of the assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs.*	Attachment 29
Attachment 30	**Historical Performance Workbook** *Use the workbook provided by Education One.*	N/A
Attachment 31	**3 Years of Audited Financials for IN Schools** *Provide the last three years of audited financial statements for the school(s) and the most recent internal financial statements.*	N/A
Attachment 32	**3 Years of Audited Financials for Whole Organization** *Provide the last three years of audited financial statements for the organization as a whole and the most recent internal financial statements*	N/A
Attachment 33	**Litigations** *Provide a summary of the demand, any response to the demand, and the results of the arbitration or litigation.*	N/A

APPLICATION COVER SHEET

Name of team or entity applying:	Colearn Academy Indiana

Name of proposed school:	Colearn Academy Indiana
Primary contact person:	Kimberly Phillips
Mailing address:	5868 E 71st St, Suite E-554, Indianapolis, IN 46220
Phone number:	520-342-0045
Email address:	kim@colearn.com
Fax:	NA

Primary contact for facilities planning:	NA
Phone number:	
Email address:	

Applicant Team

Provide the full name, current job title and employer, and the position to be held with the proposed school for all persons on the applicant team, adding lines as needed.

Full Name	Current Job Title and Employer	Position with Proposed School
Kimberly Phillips	Director of Growth and Expansion, Colearn Club, Inc.	ESP Staff
Mandi Bateman	Chief Operating Officer, Colearn Club, Inc.	ESP Staff
Michael Stanton	Co-Founder and CEO, Colearn Club, Inc.	ESP Staff
Amber Robinson	Executive Director at Colearn Academy Arizona	ESP Staff

Does this application team have charter school applications under consideration by any other authorizer(s) in the United States?

☐ Yes   X No

If yes, complete the table below, adding lines as needed.

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Proposed School(s) Information

Provide the proposed school(s) opening information, adding lines as needed. Please indicate the city/town and, if known, the potential address or neighborhood of location (Geographic Community). Virtual operators should indicate the relevant geographies intended to serve.

Proposed School Name	Opening Year	New Start, Phase-In/Takeover, or Replication	*Geographic Community	Opening Grades	Grade Levels at Full Enrollment
Colearn Academy Indiana	2023 - 24	New Start	While Colearn Academy will be open to students across the state of Indiana, we will target rural communities, with an emphasis on central Indiana counties:	K-9	K-12

			Marion, Hamilton, Boone, Howard, Tippecanoe, Hancock, Madison, Johnson, Shelby, Hendricks, and Grant. (See narrative below for more details.)		

Model or Focus of Proposed School:	Virtual

Does the school intend to contract with a third party education service provider (ESP) to manage the educational program and operations of the school but not hold the charter directly?   X Yes   ☐ No

If yes, identify the ESP or other partner organization:

Colearn Academy Indiana (CAI) intends to contract with Colearn Club, Inc., or an affiliate*, for both educational services and management services. CAI understands the requirements of and importance of Ind. Code 20-24-3-2.5, Contracting with Education Services Providers. The Organizer is working with Indiana legal counsel to ensure that the intended relationship with Colearn Club, Inc. meets such requirements.

*Colearn Club, Inc. is a for-profit entity. At this time, Colearn-Club, Inc. is working with Indiana legal counsel to restructure the ESP functions of the entity into a new 501(c)(3) entity that will contract with CAI.

Does the school intend to partner or be affiliated with an existing or planned charter management organization (CMO) through which a single governing board governs or will govern multiple schools?   ☐ Yes   X No

If yes, identify the CMO or other partner organization:

Enrollment Summary

Complete the following table, adding lines as needed.

Proposed School Name		**Year 1 2023 - 24**	**Year 2 2024-25**	**Year 3 2025-26**	**Year 4 2026-27**	**Year 5 2027-28**	**At Capacity 2028-29**
Colearn Academy Indiana	Grade Levels Served	K-9	K-10	K-11	K-12	K-12	K-12
	Total Enrollment	230	335	465	670	780	1400

Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

Colearn Academy Indiana (CAI) anticipates full enrollment in grades K-9 in our first year. School leaders have met with our targeted demographic, which includes homeschool families, homeschool groups, preschool groups, Waldorf groups, nature study groups, and moms groups, resulting in a core group of interested families. Many of these meetings have been one-on-one with interested families who have expressed support and interest in the Colearn model. These preliminary meetings and interest groups are the basis for our first year enrollment number of 230. Colearn Academy also participates in various social media groups for families, the homeschooling community, as well as the special needs community. The enrollment progression over the next 5 years is conservative, so we can build capacity as we grow in enrollment. We have a strong focus on marketing, while not sacrificing a quality education for our students. Based on enrollment trends for the first and second years of Colearn Academy Arizona, Colearn projects similar enrollment trends within Indiana. Colearn Academy Indiana is utilizing similar recruitment and enrollment strategies as were used in Arizona to engage families. These targeted strategies are used as Arizona and Indiana have comparable student populations, as well as homeschool communities, thus serving as the basis for the growth plan illustrated.

Mission and Vision

State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing

why it exists. The vision statement outlines how the school will operate and what it will achieve in the long term. The mission and vision statement provide the foundation for the entire proposal.

Replication Schools: Provide the mission of the school network, charter management organization (CMO), or education service provider (ESP), and explain how creation of the proposed school or schools fits within this mission.

Mission:

The mission of Colearn Academy Indiana (CAI) is to inspire, enable and empower all students to be responsible, resilient and personally successful in a rapidly changing world.

Vision:

Our vision is to ensure our students discover their interests and passions, create authentic work, and harness curiosity and motivation to pursue accelerated learning with connections to their peers, adult mentors, communities, and the world. Given the right trust, tools, and support, parents and mentors will make the world a classroom that always serves their children. By partnering with parents and technology Colearn enables the pursuit of extraordinary learning.

SECTION I: ADDRESSING EDUCATIONAL NEEDS THROUGH INNOVATION

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

Meets Standard Expectation
- Evidence that an educational need within the targeted community exists.
- Evidence that the school model is innovative and reflects the needs of the proposed community.

Educational Need and Anticipated Student Population

1. Provide a rationale, along with quantitative evidence, to summarize the educational needs of students within the proposed community(ies).

Colearn Academy Indiana (CAI) is dedicated to serving students of all learning styles, especially students from rural communities, including families located in the following counties: Marion, Hamilton, Boone, Howard, Tippecanoe, Hancock, Madison, Johnson, Shelby, Hendricks, and Grant. As an organization and as professional educators, we have a lens towards equity and serving those historically and currently furthest from opportunity. Due to our school model and design, we anticipate attracting curious, engaged, and exceptional families, which often struggle to fit into traditional school models.

According to research completed by the Director of Expansion and Growth, As far as we are aware, there are no similar models to the Colearn model in these communities. Some schools offer some similarities, but the Colearn approach is a unique one, combining the best of virtual education with a customized learning experience, opportunities to customize learning plans based on interests, on-the-ground opportunities to connect with other students through field trips and community service activities, and a plethora of opportunities for parents to engage in professional development activities to enrich the at-home learning experience for their families.

Using statewide educational outcomes as our guide, the rationale for selecting our location and student body are driven by the greatest needs that we see in the state. According to the Indiana College Equity Report from 2021, high school graduation rates from Indiana's 49 rural counties have dropped from 25 percent of all high school graduates, to 21 percent, stating that "the number of graduates in rural counties has stagnated while other parts of the state have grown." The report goes on to acknowledge that these communities are struggling to provide "sufficient educational resources."[1] CAI will focus on under-resourced and rural communities, as well as communities with higher proportions of low-income students, where our effective and innovative model will have the most impact. Students in rural communities often lack access to resources found in densely populated cities for enrichment and

engagement. According to NWEA Research, non-rural students increasingly outperform rural students from grades 3 to grades 8, and rural students suffer from larger summer learning losses.[2]
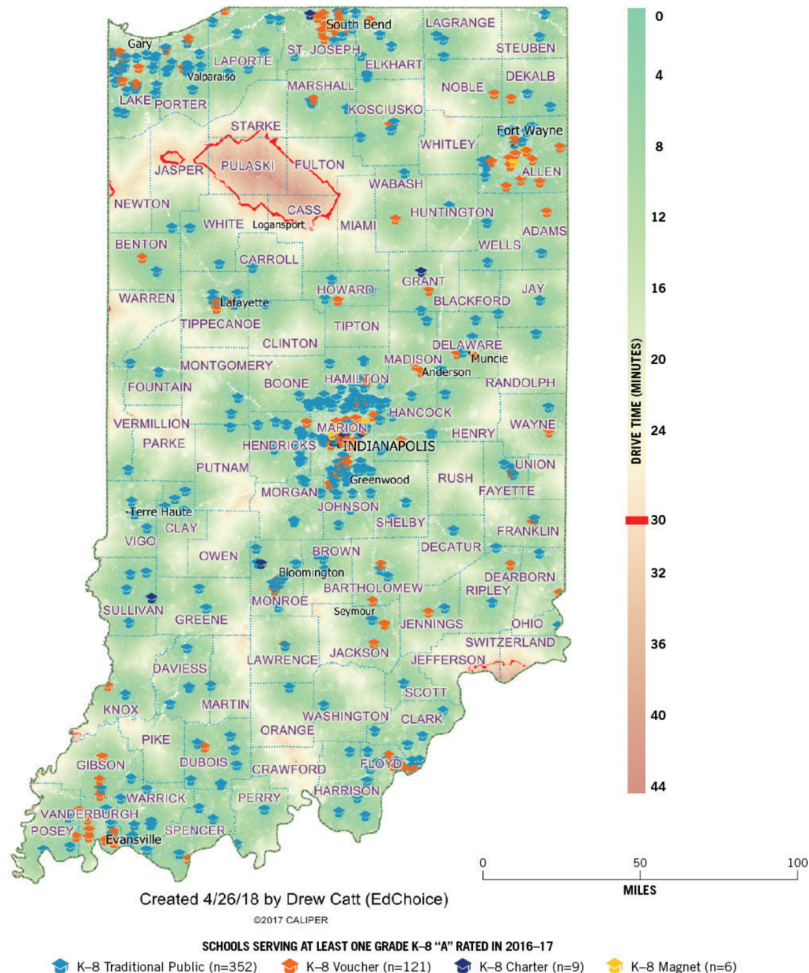
While we hope to serve underserved students statewide, we also may be able to focus outreach in more specific geographic areas that are considerable drive time to high quality schools. Luckily, Edchoice has also performed a geospatial analysis in the state of Indiana to identify "Schooling Deserts."[3] Here are some of their findings:

- 3,699 K–8 students are 30 minutes or more from any A-rated K–8 school regardless of sector.
- 9 out of 10 K-8 students are on average 31 minutes from an A-rated voucher-participating school, 92 minutes from an A-rated public charter school, and 147 minutes from an A-rated magnet school.
- 24,810 K–8 students (2.8%) live in a K–8 choice desert, meaning they are 30 minutes or more away from any K–8 charter, magnet, or voucher-participating school

Those K–8 A-rated deserts are mostly in the following areas (see Figure 7):

- **Switzerland** and **Jefferson** counties in the southeastern part of the state
- A small portion of **Crawford County** in southern Indiana
- A southwest portion of **Knox County** in southwestern Indiana
- Small parts of **Warren** and **Newton** counties in northwestern Indiana
- A sizeable desert in northwestern Indiana between Indianapolis and Chicago in Miami, Cass, White, Jasper, Starke, Pulaski, and Fulton counties

FIGURE 7 A-Rated Deserts (K–8)
An estimated 3,699 primary students live without reasonable access to A-rated K–8 schools

Created 4/26/18 by Drew Catt (EdChoice)
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SCHOOLS SERVING AT LEAST ONE GRADE K–8 "A" RATED IN 2016–17
K–8 Traditional Public (n=352)   K–8 Voucher (n=121)   K–8 Charter (n=9)   K–8 Magnet (n=6)

Sources: Authors' calculations; Indiana Department of Education (2018), *School Domain Scores* in 2017 A-F School Grade Results [Data file], retrieved from https://www.doe.in.gov/sites/default/files/accountability/af-2017-school-grade-placement-03192018.xlsx; 2016 American Community Survey 5-Year Estimates
Notes: Schools identified serve at least one grade K–8 and received an "A" grade in 2016–17. Does not include two traditional public K-terminal schools, three closed traditional public schools (one due to redistricting), and five private schools not participating in the voucher program in 2017–18.

The following is a synopsis of their findings for grades 9-12:

- 6,668 high school students are 30 minutes or more from any A-rated high school regardless of sector.
- 9 out of 10 high school students are on average 60 minutes from an A-rated voucher-participating school, and 88 minutes from an A-rated charter school.
- 45,072 high school students (9.8%) live in a high school choice desert, meaning they are 30 minutes or more away from any charter, magnet, or voucher-participating high school.
- 52,661 high school students (11.5%) have reasonable access — 30 minutes or less — only to their public school or a poorly rated school of choice.

Those high school A-rated deserts are mostly in the following areas (see Figure 11):

- The northeastern-most portion of the state in **Steuben** and **DeKalb** counties
- The eastern part of the state in **Union, Fayette, and Rush** counties
- The southeastern-most portion of the state in parts of **Dearborn, Ohio, Switzerland, Jefferson, Scott, Jennings, and Ripley** counties
- **Perry, Crawford, Spencer, and Orange counties** in southern Indiana—potentially exacerbated by the presence of Hoosier National Forest
- **Knox County** in southwestern Indiana
- Parts of **Martin, Lawrence, Monroe, Bartholomew, Brown, and Morgan** counties in south-central Indiana—potentially exacerbated by the presence of Brown County State Park
- Parts of **Owen and Clay** counties in western Indiana
- A large desert in western Indiana from **Clay and Vigo counties up through Parke and Vermillion counties to Montgomery, Fountain, and Warren counties**

FIGURE 11 A-Rated Deserts (9–12)
An estimated 6,668 secondary students live without access to A-rated high schools
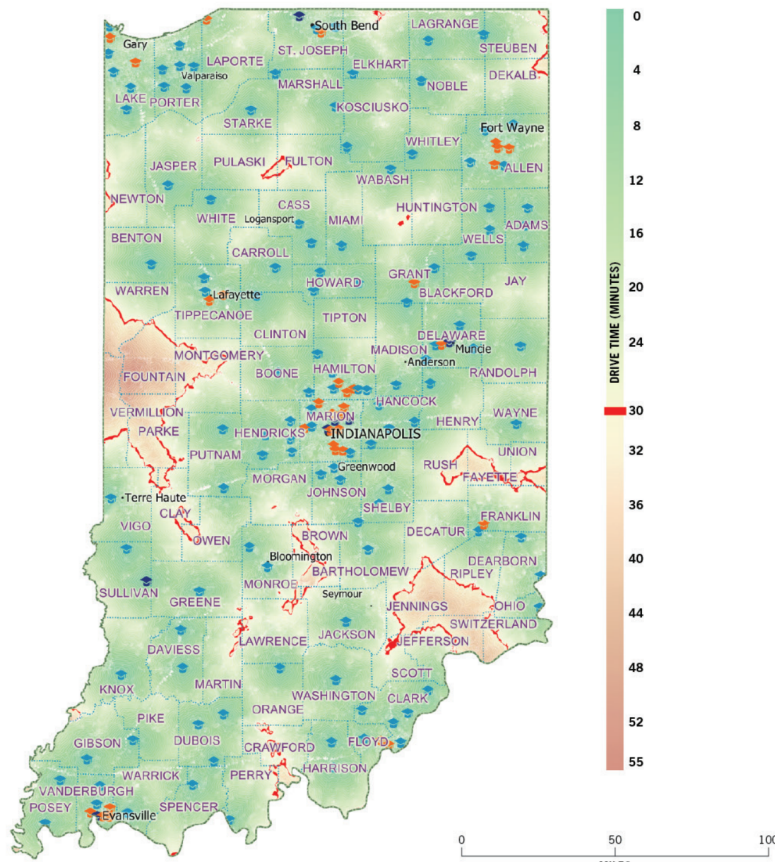
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SCHOOLS SERVING AT LEAST ONE GRADE 9–12 "A" RATED IN 2016–17

9–12 Traditional Public (n=119)   9–12 Voucher (n=32)   9–12 Charter (n=7)

Sources: Authors' calculations; Indiana Department of Education (2018), *School Domain Scores* in 2017 A-F School Grade Results [Data file], retrieved from https://www.doe.in.gov/sites/default/files/accountability/af-2017-school-grade-placement-03192018.xlsx; 2016 American Community Survey 5-Year Estimates
Notes: Schools identified serve at least one grade 9–12 and received an "A" grade in 2016–17. Does not include two traditional public K-terminal schools, three closed traditional public schools (one due to redistricting), and five private schools not participating in the voucher program in 2017–18.

CAI will address this need by providing access to a built-in community of other learners along with opportunities to engage with our Indiana-credentialed teachers, who we call Educational Specialists. By providing access to synchronous live and interactive classes, students have the opportunity to know other students and be known by their teachers. With access to on-the-ground and virtual field trips, students have the opportunity to explore interests, dive deeply into subject matter, and strengthen friendships within the school environment.

In addition, as the number homeschooling of students in Indiana has increased since the beginning of the pandemic, there is an increased need for resources and help for parents new to educating at home. Students withdrawing from public school to homeschool in Indiana have increased from 11,909 in 2019-2020 to 20,888 in 2021-2022.[4] Colearn has a unique opportunity to serve these families, particularly in the counties specified by providing access to resources that families could not acquire on their own. In rural communities, home educating families have limited access to an abundance of opportunities to connect with peers, participate in field trips, as well as a lack of professional development opportunities for parents who are educating their children in the home. Colearn seeks to bridge this gap in our specified communities by bringing an abundance of resources for this demographic.

CAI is built on an innovative model — one that is already demonstrating efficacy in Arizona at Colearn Academy Arizona — in which far greater student learning is unleashed by moving beyond the limited, brick-and-mortar school building. CAI is an online public charter school, and as such, student achievement is made possible by — but certainly not limited to — online learning. All CAI students have unlimited access to the highest quality digital curriculum in an online learning environment, and mastery of skills, competencies, and standards are continually assessed to then generate students' responsive recommended learning paths online. In addition to time online, CAI students form an active and engaged community within their community; the CAI online platform surfaces high rigor and high relevance engagement opportunities and facilitates 'colearning' in the world and the students' communities.

Like Education One, CAI is a student-first organization, and we set high academic expectations across our curriculum to ensure that all of our students are college- and career-ready. To date, our model in Arizona is already demonstrating its effectiveness: 61 percent of students showed growth on the NWEA MAP Benchmark[2] from Fall to Winter in Reading, and 58 percent showed growth from Fall to Winter in Math, and what's more, 71 percent of our SPED students showed growth in Mathematics, and 57 percent showed growth in Reading.

Based on specific data within Arizona's rural communities, students are demonstrating growth on standards-aligned benchmarks. For students in grades K-3, 91.2 percent improved at least one grade level in reading from Fall to Spring on NWEA MAP Growth. Of these students, 51 percent grew one grade level, 27.6 percent grew two grade levels, 10.6 percent grew three grade levels, and 2 percent increased by four grade levels based on Lexile reading levels from NWEA MAP Growth. In grades K - 9, 58.3 percent of our rural students met the growth goals set by NWEA MAP in Math, while 61.2% met the growth goals in Reading. Through the Colearn model, we anticipate similar outcomes in Indiana, as well as Indiana's rural students in partnership with families. Partnering with families is key to the success of Colearn, click here for testimonials from current Colearn Academy Arizona families on why they believe the model works for their children.

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[1] https://www.in.gov/che/files/2021_College_Equity_Report_07_08_2021.pdf

[2] MAP Growth from NWEA® is a computer adaptive assessment—meaning that the difficulty of questions adjusts throughout the assessment based on the student's responses. MAP Growth assessments provide a scaled score referred to as the RIT score, which is a measurement that quantifies a student's academic performance. The RIT score allows educators to initially identify students' achievement in a given subject area. Since the RIT scale is grade-independent, educators can track a student's growth over time. Based on a student's RIT score, MAP Growth assessments provide suggested areas of strength and focus that address New York State Learning Standards so that educators can personalize their instructional planning for students in their classrooms.

[3] Andrew D. Catt and Michael Shaw. Indiana's Schooling Deserts. Identifying Hoosier Communities Lacking Highly Rated Schools, Multi-Sector Optios. Edchoice. August 2018.

[4] FOX59.com. "State numbers show number of kids withdrawing to homeschooling nearly doubled last school year." 5 Aug 2021.

Innovative Approach to Education

1. Summarize the innovation(s) embodied in the proposed school design. How does this specific school model meet the needs of students within the proposed community(ies)? The summary should include, at a minimum, the following:
   - An explanation of how the proposed model is fundamentally different than typical school models, specifically those

found in the district or community in which the charter school(s) will be located
- Any available evidentiary basis for the efficacy of the model or for the ideas underlying the model and how it meets the needs of the anticipated student population

There are a number of ways in which Colearn Academy Indiana (CAI) students are educated more effectively than existing virtual charter schools or brick and mortar schools within the community. While CAI is technically a virtual school, it is not strictly an online school. Students learn at their homes, using real-world experiences, books, and online resources. Students demonstrate mastery through a range of holistic assessment techniques including projects and personalized learning PATHs. They are monitored and encouraged by their Program Mentor (a consultant who is typically a parent/guardian), taught by a credentialed Educational Specialist, and provided with experiential learning opportunities such as field trips, meet-ups, internships, and live workshops coordinated by instructional assistants known as Experiential Leads.

What's more, our ability to provide tailored options to families will allow us to develop rural-agricultural educational offerings for students in rural Indiana, something that schools are not adequately providing. Our guiding beliefs also set our model far apart from the schools that are now serving our targeted student population.

- We believe that traditional schooling limits students' creativity and individuality.

  "As we face a very uncertain future, the answer is not to do better than what we've done before. We have to do something else. The challenge is not to fix this system but to change it; not to reform it but to transform it. The great irony is the current malaise in education is that we actually know what works. We just don't do it on a wide enough scale. We are in a position as never before to use our creative and technological resources to change that. We now have limitless opportunities to engage young people's imaginations and to provide forms of teaching and learning that are highly customized to them." — Ken Robinson, *Creative Schools*

- We believe that traditional classroom settings with one or two teachers do not and cannot, structurally, allow students even a fraction of the access to talent, teaching, and mentorship that they need and deserve.

  "In a distributed teaching and learning system there need not be, and rarely is, one mentor/teacher. Rather, for different activities and skills there are different people to serve as mentors/teachers; there are different places to go; and there are different sorts of tools, technologies, and media to act as surrogate mentors/teachers. The distributed system is a hive of connected activities. Learners at all different levels can traverse this hive and dive into the places that have mentors and tools that are right for their current ZPD for a given skill." — James Paul Gee, *Teaching, Learning, Literacy in our High-Risk High-Tech World: A Framework for Becoming Human*

- We believe that education is more effective through "pull" rather than "push."

  CAI believes that at the heart of deep learning is engagement. Students deserve to be exposed to more than a classroom alone can offer — to a broad set of real-world roles, scenarios, and possibilities, especially where they express the most interest. If students are interested and engaged, they will want to learn; they will "pull" education through a set of experiences instead of having it "pushed" upon them. The key is identifying those interests. Once it is found, curriculum and educational experiences can be embedded within and around organic interests.

- We believe that "school" and "home" must operate in harmony in order for students to make the greatest growth.

  CAI emphasizes the benefits of positive family relationships (while never using any given circumstance that may affect a student at home as an excuse for lowered expectations). As depicted in the landmark book, The Second Shift, many parents are now dealing with compounding stress at home, and that stress is having negative effects on marriages and family communication.[2] So, there is now a need for children to participate in family responsibilities in order to diffuse stress at home, appropriately. In addition, quality communication between parents and their children is a necessary precursor to peak performance at school.

  "How parents help children to think about (process, edit) experiences in the world and in media, and how they teach children what it is important to pay attention to (what matters and why), are the foundation of the child's initial and enduring perspectives on (theories about) the world. All later learning is layered onto this foundation, and this foundation deeply affects that later learning. If the foundation is not solid or not finished, the child needs help. That help involves teachers and mentors designing good experiences and meaningful play opportunities for the child, allowing time for horizontal learning at each level of learning, and lots of nurturing experiential dialogic talk with adults or more advanced peers." — James Paul Gee, *Teaching, Learning, Literacy in Our High-Risk High-Tech World: A Framework for Becoming Human*

- We believe that there is no need to wait — and every reason to move forward — for a technology-enabled, transformed school model that delivers the true promise of an engaging, effective education community beyond the four walls of a traditional school.
- As the Covid-19 pandemic has demonstrated, the world is a rapidly changing, at-times-unstable place. We cannot predict the future; however, we believe that we must diversify learning opportunities to ensure our students' access to high-quality learning materials.
- We believe that parent engagement and support is critically important to students' learning success and students' engagement. A key component of enrollment and onboarding at Colearn Academy includes resources and workshops geared specifically towards parents.

As stated above, we have demonstrated positive outcomes for students through Colearn Academy Arizona. Based on NWEA Map Benchmark data, 61 percent of students showed growth from Fall to Winter in Reading, and 58 percent showed growth from Fall to Winter in Math, and what's more, 71 percent of our SPED students showed growth in Mathematics, and 57 percent showed growth in Reading. Because of our model, we believe the same outcomes can occur for the target population of Indiana, thus providing an enriched and innovative model for students that is different from other school models within the communities in Indiana.

SECTION II: EDUCATIONAL PROGRAM DESIGN & CAPACITY

Curriculum and Instructional Design

Meets Standard Expectation
- Framework for a rigorous, quality instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed expectations of the Indiana Academic Standards (IAS).
- Comprehensive, quality curriculum overview that includes a sample course scope and sequence for one subject for one grade for each division (elementary, middle, high school) the school would serve, and demonstrated alignment of course outcomes with applicable standards. Sound curricular choices, by subject, including reason evidence the curriculum will be appropriate and effective for the targeted students.
- Sound instructional strategies and explanation of why they are well suited for the targeted student population, including effective methods and systems for providing differentiated instruction to meet the needs of all students.
- Evidence that the proposed educational program has a sound base in research, theory, and/or experience, and has been or is likely to be rigorous, engaging, and effective for anticipated student population.

Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures all students will meet or exceed the state standard.
1. Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.   If multiple schools/campuses are being proposed, explain any differences among them.

The learning environment at Colearn Academy Indiana will be virtual, hybrid, independent self-study, and asynchronous project-based learning – with an innovative mix of class and group formats, learning modalities, and experiential learning. The class size will vary, depending on enrollment in each grade level. We anticipate assigning no more than 40 students to each teacher. Program Mentors will work with smaller groups of students – often directly within their own children or the children under their care. Thus, they ensure students stay on track, complete their work and projects, and have opportunities for educational experiences and internships outside of the virtual classroom hours — creating an individualized learning experience for each student. Each family and Program Mentor who works with the students has the opportunity to design and facilitate a learning environment that best meets the needs of learners and motivates them for academic achievement. This includes accommodations for students with an IEP or strategies that best serve special populations, such as EL students or gifted and talented students. Program Mentors will be guided by and work alongside the classroom teachers, or Education Specialists, in order to ensure all students meet or exceed expectations of the Indiana Academic Standards and provide guidance for differentiating based on the curriculum and needs of the students.

An Academic Term has the following rough outline:
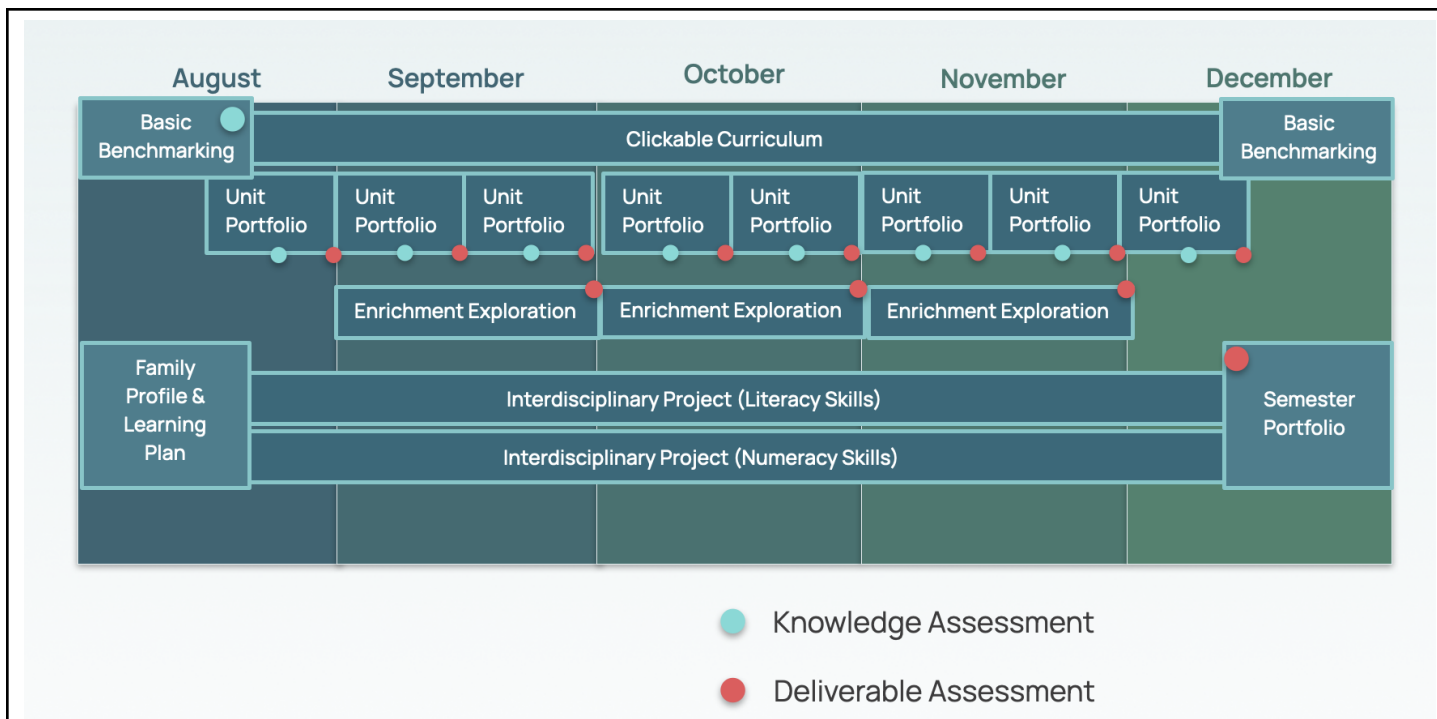
The Experiential Lead will work with the Executive Director and the Director of Parent Engagement from Colearn ESP to understand the opportunities for community experiences in Indiana and the ideas, needs, and wants of families enrolled. Experiential learning will be planned, on average monthly throughout the active school year in the form of field trips, events, meetups, park days, parent workshops, and visits or open invitations to local appropriate establishments.

Meet our Student Personas

Through Colearn Academy Indiana, students like Sophia and Edward – student personas introduced below – discover a cornucopia of resources, both online and in their communities. When they login to the Colearn portal and work with their parents/guardians and our staff, they find programs, courses, experiences, places, mentors, and teachers for both the core curriculum and their interest-based pursuits.

Sophia

Sophia's mom has always seen a precocious side to Sophia. In school, however, Sophia struggled with reading, got average marks in math, and had shallow/nonexistent relationships with most of her peers. Finally, in 3rd grade, Sophia's mother Maria made the difficult decision to pull her out of traditional public school and try homeschooling.

That decision, however, was hardly the most difficult part. Maria had to start from scratch finding appropriate curriculum, organizing social outings and cultivating a support network. Maria saw improvement in Sophia every day. However, at the end of the year, Maria was not certain that she would be able to keep up with the demands, both mental and financial, of schooling Sophia at home. Luckily, Maria heard about CAI from a friend.

At the start of Sophia's 4th grade year, Maria suddenly had access to the top-notch online curriculum provided by CAI. Maria had always felt confident in guiding Maria through her work, but was slightly worried that she might "miss something"—that is, forget to teach a state standard. The online curriculum, aligned to state standards, solved that issue. With funding provided by CAI, Sophia was able to join the local youth soccer league where she began two close, flourishing relationships with peers. At sessions led by CAI's content lead teachers, Sophia found that she had a natural predisposition to coding in the Construct3 programming language. Sophia caught up in reading and finished her "grade-level" work in March of the school year and had time to teach herself about opera costume design.

A Colearn Academy 4th Grade Student

Sophia's "School Year"

🎵 Music & Fine Arts

- Online recorder lessons
- Attends monthly musical concerts
- Saw community college's productions of the Nutcracker and Cinderella with nearby Colearn students

💡 Experiential Learning

- Milked a cow and learned about the food supply chain at a small dairy
- Took a tour of the mirror lab at University of Arizona and learned how the telescopes on Mt. Lemmon in Tucson are constructed

📖 Academics

- Closed reading gap
- Finished all "grade-level" coursework by mid-march
- Completed 1.5 grade levels in an adaptive online reading curriculum
- Took public speaking course

⚗️ Academic Enrichment

- Joined youth soccer league
- Sold handmade bracelets at farmer's market
- Learned how to code and created a "happy bird" clone that she and friends play

Edward

Edward disenrolled from his local school at the age of 15. In his first year of "colearning," he explored the performing arts (playing the lead character in a Shakespearean play, attending eight operas, four plays, five bluegrass concerts, three classical concerts; and, he learned to play Swing, Jazz, and Blues on Violin), creative writing (wrote a novel and submitted it into a national competition and edited his uncle's memoir), science (completed a solar energy experiment, presented it at a science fair, and attended a wind tunnel test). Simultaneously, he also completed more than a full year of core coursework. He passed three semesters' worth of math and a year of each of the following: English, Geography, Anatomy, and German, as well as AP Biology. To boot, Edward enriched his interest in Biology with college-level courses in Regenerative Medicine and Bioethics.

A Colearn Academy High School Student

Edward's "School Year"

Music & Fine Arts

- 8 live Operas, 4 plays, 5 Bluegrass Concerts, 3 Classical Concerts, 1 Bagpipe Concert, 1 Rock Concert
- Played the Lead in a Shakespearean play
- Learned Swing, Jazz, & Blues on Violin

Academics

- 2 Semesters of Geometry, 1 Semester of Algebra II, Advanded AP Biology, Regenerative Medicine Series, Bioethics Seminar, Anatomy & Physiology Class, English, Geography, and German Classes

Experiential Learning

- Disassembled Washing Machine with Friends
- Attended Historic Wind Tunnel Test
- Saw Record-Breaking Landing of Solar Airplane
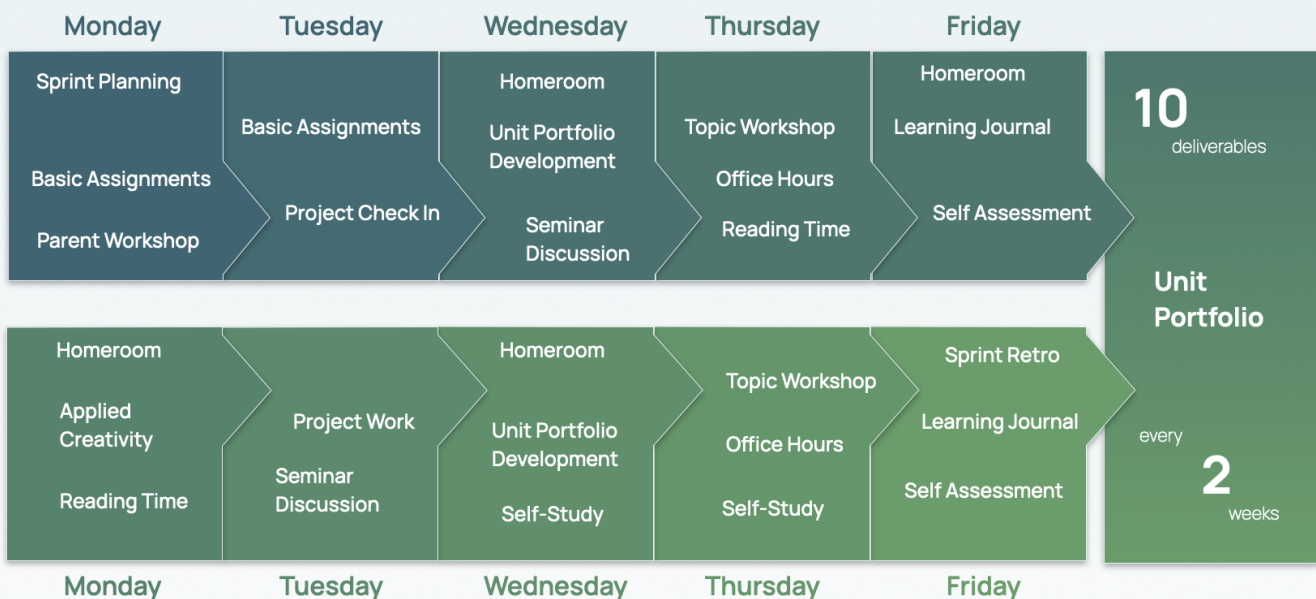
Academic Enrichment

- 2-Month Solar Energy Experiment and Science Fair
- National Novel Writing Competition
- Edited Uncle's Memoir (Now on Amazon)

This is colearning. This is the promise of what CAI makes possible for students for whom traditional schooling might be holding them back rather than lifting them up.

For students like Sophia and Edward, a "Unit" during which they would develop a PATH "unit portfolio" might look like this:

PATH
Unit Portfolio — Two Week Unit

Monday	Tuesday	Wednesday	Thursday	Friday	
Sprint Planning; Basic Assignments; Parent Workshop	Basic Assignments; Project Check In	Homeroom; Unit Portfolio Development; Seminar Discussion	Topic Workshop; Office Hours; Reading Time	Homeroom; Learning Journal; Self Assessment	**10** deliverables
Homeroom; Applied Creativity; Reading Time	Project Work; Seminar Discussion	Homeroom; Unit Portfolio Development; Self-Study	Topic Workshop; Office Hours; Self-Study	Sprint Retro; Learning Journal; Self Assessment	**Unit Portfolio** every **2** weeks
Monday	Tuesday	Wednesday	Thursday	Friday	

2. Provide an overview of the planned curriculum, including, as **Attachment 1**, a sample course scope and sequence for one

subject for one grade for each division (elementary, middle, high school) the school would serve.

3. Identify course outcomes and components to demonstrate alignment with applicable state standards.

The Colearn Academy Indiana (CAI) curriculum will meet Indiana Academic Standards. CAI curriculum providers will include Edmentum and Edgenuity, which are fully aligned to Indiana State Academic Standards and include approved iCAP courses. Edmentum's Course Catalog for Indiana includes core courses and electives for grades K-12. Edgenuity (now Imagine Learning) also offers courses aligned to Indiana State Academic Standards and approved iCAP courses for grades K-12. While Edgenuity's latest course catalog generally shows alignment to Common Core State Standards, it does indicate Indiana aligned courses are available through a specific Indiana Course List and are on the approved iCAP course list.

Additionally, other supplemental curriculum providers that are used will be aligned with the Indiana State Standards. For instance, Amplify, McGraw Hill, Savvas Learning, and Studies Weekly show alignment with Indiana State Standards. CAI will ensure all core and supplemental curriculum are aligned by requesting crosswalks from the curriculum provider or by following a rigorous process to evaluate curriculum alignment to the Indiana State Standards. This process includes a committee made up of certificated teachers, administrators, parents, and other key stakeholders to provide an intensive review process of curriculum and its alignment to the state standards for core and supplementary curriculum. The committee will make recommendations for the adoption of curriculum to key stakeholders prior to adoption.

Curriculum providers will be implemented using the Colearn Planner — a process detailed here on our Knowledge Base article: Where can I find new learning resources? Then how to I use them in the planner?.

The curriculum will develop a foundation of basic skills and cultivate higher-order thinking skills. It will be simultaneously rigorous, engaging, and relevant to students. The school's curriculum and instructional framework is guided by best practices in K-12 online study learning models used nationwide. The school's curriculum is also compliant with State Standards and is designed to meet the accreditation standards of Cognia as well. CAI's full-year courses are designed to contain approximately 180 hours of course work to complete or the equivalent of one Carnegie Unit or one year of study. Our semester courses are designed to deliver approximately 90 hours of course work to complete and are the equivalent of one-half of a Carnegie Unit or a high school semester.

Students, Program Mentors, and teachers will utilize the available "clickable curriculum" provided by the Colearn portal to supplement virtual instruction with additional supporting material regarding a particular concept, guidance as to "what to look for" during the reading assignment, and additional reference materials from the Internet or other sources to expand on the concepts presented in the readings, stories, and supplemental texts.

CAI leverages technology to create a new, highly personalized model of online education. Its students benefit from:
- Scaffolded, project & portfolio-based learning
- Guided portfolio development practices
- Learning paths through appropriate, relevant content using any and all available quality resources
- Live, synchronous sessions, facilitated through seminar style dialogue
- Quality peer and near-peer interactions
- Responsive, caring instructors
- Guidance counseling
- College planning
- Personalized Learning Plans (PATHs)
- Embedded opportunities for socialization with peers, adult mentors and teachers
- Experiential learning through field trips, field research, and service-learning projects
- Options for students to have internships in their local community, completing projects aligned with content standards and meeting the needs of the business or organization where they are interning
- Support, resources, and learning opportunities for parents/guardians

Personalized Learning Plans: PATHs

Every student creates, with input from their parent(s), guardian(s) or adult mentor(s) and a school advisor, a digital personalized learning plan (PATH) that is revised annually, and more frequently as needed or desired.

"Colearners" (students) enrolled in Colearn Academy Indiana choose their interest and work with their family, teacher and advisor to create and iterate on a PATH— a personalized learning plan that accounts for Proficiency, Achievement, Talent, and Heart. Each student's PATH leverages the entire ecosystem available (community), all the possible personal relationships to propel learning across that ecosystem (advisors and mentors), and the student's unique profile of talents and development opportunities. The PATH includes: 1) accelerated and deeply focused goals progressing through the outcomes that the student cares most about and that the educators confirm incorporate the necessary academic standards, 2) curated research-based activities that require authentic work and real-world deliverables, 3) individual and collaborative project-based learning, 4) service learning in their community, and optionally at the higher grade levels 5) internships within a professional working environment.

Students are guided through a series of questions where they discover what learning strategies and pedagogies work best for them, as well as career aptitudes and jobs to explore. Students are scaffolded in learning how to evaluate their own work through quality rubrics, and discussing the merits and deficiencies in their work and ideas is an important part of the core experience. While students are evaluated individually, they are responsible for contributing to collaborative learning through projects and have rubrics to effectively discuss and evaluate mutual contribution. Students are grouped by ability and interests, not by grade or age. Student voice and choice are honored as they work through project completion that exhibits core competencies and mastery of standards in interdisciplinary subject matter assignments.

During the enrollment and orientation process at Colearn Academy Arizona, students are provided the "Clifton Students Strengths - Top 5" or similar assessment and results. This helps to create a learner profile that captures interests, passions, preferred learning strategies, intelligences, talents, and skills; orientation assessments are used to help facilitate self-discovery where these may be latent or unclear; all self-discovery services help the students and their families hone a narrative of purpose. This narrative clarifies for the students and their parents the ways that the student is unique and the reasons why they are enrolled in Colearn Academy. This information serves to create a profile that others can see and a dashboard from which learners can create and implement learning plans.

For all learners, Program Mentors are walked through a setup process on Colearn's proprietary platform technology, which enables parents to identify subjects and topics that fall into "zones" based on a scale of interest to disinterest, struggles to excel. This maps these subjects and topics into a Zone of Genius, Zone of Aptitude, Zone of Passion, and Zone of Persistence. Based on this, parents are coached to select resources and set up "blocks" with a duration and frequency during the week for their learner's weekly routine.

In the K-8 levels, more care is given to helping the students uncover their latent interests and discover their strengths in order to be prepared for more independent PATH revisions during the 9-12 grade years. Here again the students are grouped according to ability and interest, not grade or age, but the curated projects the students choose from are grade-level appropriate (so, for example, a unit study on rocketry might include basic trigonometry for an 8th grade student but only include information on the shape of the rocket's trajectory for a 3rd grade student).

Learning to Learn

Colearn Academy Indiana prioritizes the importance of focused deep work and flow states, particularly in realms that require deliberate practice. In the influential book Flow: The Psychology of Optimal Experience, Mihaly Csikszentmihalyi represents the skill sets related to producing and engaging in flow states as liberating. "To overcome the anxieties and depressions of contemporary life, individuals must become independent of the social environment to the degree that they no longer respond exclusively in terms of its rewards and punishments. To achieve such autonomy, a person has to learn to provide rewards to herself. She has to develop the ability to find enjoyment and purpose regardless of external circumstances. This challenge is both easier and more difficult than it sounds: easier because the ability to do so is entirely within each person's hands; difficult because it requires discipline and perseverance that are relatively rare in any era, and perhaps especially in the present. And, before all else, achieving control over experience requires a drastic change in attitude about what is important and what is not."

Through the consistent, curated experience of learning to learn, CAI's graduates will be:

1. **Resilient:** "Sustainability used to be a major goal for many people and institutions. Sustainability meant being able to retain core goals and values in the face of change. However, today, change is more rapid, risky, and unpredictable than ever before. So people, families, and institutions will need to be resilient" (Zolli & Healy, 2012). To be resilient means being able not only to adapt to change but also, when necessary, to change, even in large ways, in the face of change, to become new. Resilient people put in lots of effort and can persist past failure and even serious setbacks, all the while accepting that humans are frail and hope is not always easy.

2. **Proactive:** To be a proactive agent means being able to participate (not just spectate) and produce (not just consume) in ways that matter positively for one's self, others, and our shared world. Participating and producing requires one to think like, and sometimes be, a designer of things, texts, media, or ideas.

3. **Deliberate:** To be a deliberate learner is to be a self-teacher, a person who can direct his or her own learning and attention and who regularly seeks out new experiences and challenges to deepen old capacities and develop new ones.

4. **Insightful:** Defined as being able to deal with complexity and to understand systems and not just their components. Being able to engage fruitfully in discussion and reflection with one's self and others on multiple perspectives in the service of a slow journey to more truth and peace. These are both crucial because system complexity and conflicting perspectives are at the heart of our major problems and crises today. The goal is not consensus or conversion, but gradual progress to deeper understandings of our own perspectives and those of others.

5. **Discerning:** Discerning learners are able to make good decisions in important domains in life and recover from bad ones. They are able, as well, to seek out and find good sources of mentoring, guidance, and help. They don't just have knowledge; they use it.

Character Development

An assortment of educators, psychologists, and even economists have begun to question the wisdom of over-emphasizing cognitive academics, and instead have started to produce evidence that supports an alternative emphasis — some call them noncognitive skills, others call them soft skills or even power skills. Traditionally, these skills have been thought of as character or personality traits. For example, avoiding distractions and maximizing focus, observing and adapting to environmental and behavioral norms, persistence in the face of boredom or confusion, managing impulses and delaying gratification, coping with emotions, organizing ideas, and analyzing thoughts, as well as the typical curiosity, conscientiousness, optimism, agency, grit, resilience, self-confidence, self-advocacy.

Below are key research findings that directly inform Colearn Academy Indiana's approach to character development:

● Five Factor Rating: American educators have known about the value of character for some time. In 1967, Gene Smith created a way for a college student's peers to rate them on "strength of character" — a phrase Smith used to describe a five factor rating, with the factors of "Agreeableness, Extraversion, Work-orientation, Emotionality, and Helpfulness." This measure was three times more successful in predicting college performance than any combination of other indicators he could find, including SAT scores, grades, and class rank. In James Heckman's analysis of the Perry Preschool Project conducted in the 1960s, he found that noncognitive skills attributed two-thirds of the value of a two year preschool program decades later, into adulthood. Walter Mischel's famous marshmallow test demonstrated that the teens taking the SAT who were able to wait for the full 15 minutes before they ate the marshmallow scored 210 points higher than those that ate it within 30 seconds. Given this, it's particularly regrettable that public education has generally neglected the training of these factors, and has instead focused on the core subject areas set forth in 1913 by the Carnegie Foundation.

● Optimism: One key aspect to resilience is a mental habit that leans towards healthy optimism. A pessimistic attitude tends to generate explanations of setbacks as "permanent, personal, and pervasive." Optimists, by contrast, explain setbacks as temporary, limited in scope, and attributable to things that can change and improve for the next time. And, the best time for people to learn optimism is before puberty but after metacognitive thinking has set in — so early adolescence.

● Motivation (Component of Grit): In introducing to the mainstream the concept of grit, Angela Duckworth separated the concepts of motivation and volition. Volition is Duckworth's term to describe willpower and self-control. Motivation is more important than cognitive abilities in providing the volition to plow through boring cognitive tasks that relate to learning outcomes.

● Conscientiousness: Through decades of trial and error, industrial and organizational psychologists have found that conscientiousness as measured by the Big Five assessment is the measure that best predicts success at work. "People high in conscientiousness get better grades in high school and college; they commit fewer crimes; and they stay married longer. They live longer — and not just because they smoke and drink less. They have fewer strokes, lower blood pressure, and a lower incidence of Alzheimer's disease.

To develop the character of each child, CAI centers its efforts around the following traits: self-control, social intelligence, gratitude, optimism, and curiosity. We may choose to work with an organization like Character.org, which provides resources to build nurturing and supportive school cultures that focus on a set of core values and character strengths. We believe that our focus on character, school culture, and networks of support is revolutionizing online home education.

As of the 2022 school year, Colearn Academy Arizona is implementing a school-wide SEL and Character Development initiative based on "values" — each teacher is asked to raise a highlight value for the month in their live classes and clubs. Memos are sent to parents that give them tips on how to discuss the value with their family. Students are asked to write reflection journal entries on how they embodied the highlight value. The list of values CAI will work through are below:

- Catalytic Curiosity
- Imaginative Inquiry
- Positive Presence
- Enthusiastic Engagement
- Convergent Creativity
- Audacious Authenticity
- Inspired Initiative
- Riveting Rigor
- Deliberate Dedication
- Integrated Independence
- Purposeful Persistence
- Practical Patience
- Model Maturity
- Empowering Empathy
- Resourceful Resilience
- Continuous Contribution
- Ingenious Invention
- Lean Leadership
- Outward Ownership
- Advanced Accountability
- Rigorous Responsibility
- Aspirational Achievement

4. Summarize program choices by grade and/or subject, and the rationale for each. Describe the evidence that these programs will be appropriate and effective for the anticipated student population.

Learning in Colearn Academy Indiana will take place using one of the five modalities.

1. *Curriculum Assignments (content-specific and competency-based) All grades:*

    The Curriculum Assignments are administered by the Program Mentor with the supervision of the Content Lead teacher. Colearn Academy Indiana utilizes traditional core subjects as inputs into other curriculum arcs. We hold foundational assumptions about academic learning: 1) students can learn the requirements of the State of Indiana in a compressed time frame by tapping into clickable curriculum resources, textbooks and workbooks, and our process of self-study protocols, 2) non-traditional cognitive and noncognitive skills should be emphasized, 3) standard core curriculum requirements can be met through interdisciplinary content included in skill development, and 4) support for student learning can come from family, friends, and others in a scholarly yet non-scholastic environment.

2. *Learning Projects: All grades:*

    Colearn Academy's software will provide a framework for projects that students self-select to work on in small collaborative groups with the support of adult mentors (parents or experts from a specific field) and a Content Lead (credentialed) teacher. As students provide evidence of meeting content standards, it will be tracked in the software. Students and teachers will see that a student has completed a percentage of two or three specific subject areas for each project completed. The software will resemble elements of popular video games, where a student experiences opportunities to try

again until they are successful and "levels up" once they've achieved baseline milestones and are ready for more advanced projects.

3. *Collaborative Workshops (synchronous interactive courses): All grades with intensive focus 6-12:*

For this instructional modality, there will be a menu of live, synchronous learning opportunities lasting between 2-4 weeks that students can opt-in to. These learning workshops occur using a video conference platform or in some cities via face to face meet-ups. Learning workshops offer students the chance to participate in live discussions with credentialed teachers, experts and Program Mentors, and other students to learn specific content skills. Access to these courses will be available based on students' readiness and skill-level abilities, not age or grade.

This modality is led by the Content Lead teacher, with assistance from the Program Mentor as needed. The learning workshop modality is particularly valuable for Colearn Academy's future ready content.

4. *Experiential Learning: Internships for 9–12 and field trips for K–8:*

An important element of the education at Colearn Academy is that students learn in the real world. A component of every student's education is an option for one or more internships, beginning in ninth grade if the student is ready. In this internship with an expert mentor in the field of the student's interest, the student completes an authentic project that benefits the student's learning PATH (see below) and the mentor at the internship site. The projects are connected to the student's interests and meet the needs of the mentors, and are the main root to deepening student learning and academic growth. This modality is supervised by the Content Lead teacher, with assistance from the Program Mentor as required.

In the K-8 grades, experiential learning is embodied through meet-ups, field trips, shared labs and learning experiences within their community. These types of experiences are coordinated by the Experiential Lead with input from the Content Lead and Program Mentor parent.

5. *Guided Pathway Portfolio Development (summative assessment of mastery and student reflection on their experiences from modalities one, two, three, and four):*

Guided Pathway Portfolio Development refers to a ten step process that can be repeated across the curriculum. This modality is supervised by the Content Lead, with assistance from the Program Mentor and students themselves. Students approach a unit/lesson by planning ten activities they will use to create a portfolio, one for each of the stages in the unit/lesson as illustrated below:

Curricular Philosophy
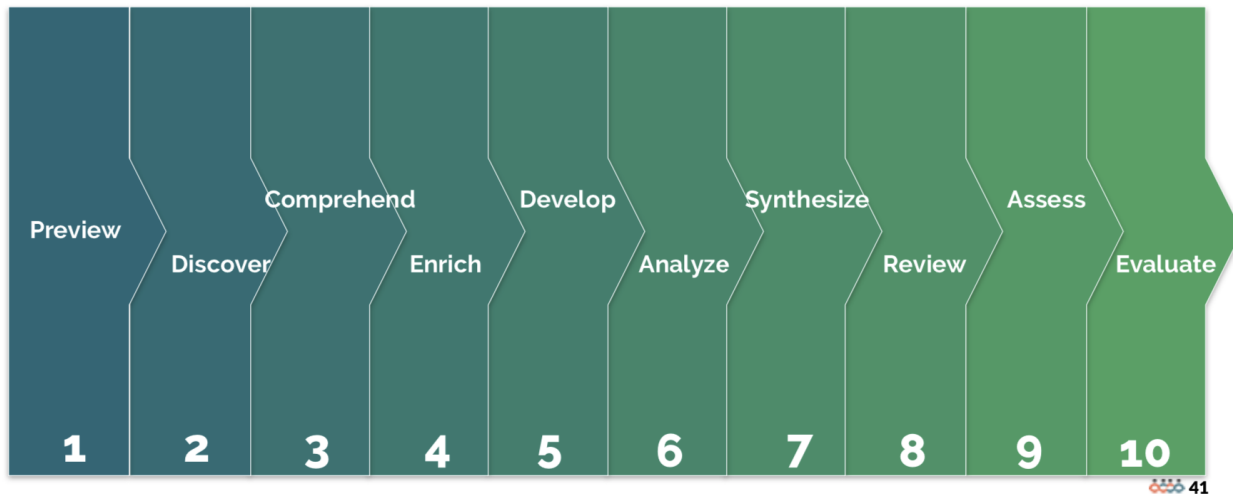
All students will be expected to experience modalities one, two, and five each year, and have the option to experience modalities three and four in varying degrees based on their preferences. There will be options for students to experience field trips within the Learning Projects and Experiential Learning modalities. High school students may access internships and college classes via concurrent enrollment where available.

The weighting and balance among modalities will be determined within the student's annual Personalized Learning Plan (PLP), also known as a PATH that accounts for Proficiency, Achievement, Talent, and Heart. Some students will opt to complete a high number of learning projects, while other students will do a minimum quantity of learning projects and opt for a higher number of synchronous interactive courses (collaborative workshops) or curriculum assignments.

Each student's PATH leverages the entire ecosystem available (community), all the possible personal relationships to propel learning across that ecosystem (advisors and mentors), and the student's unique profile of talents and development opportunities. English Language Arts: CAI's adopted curriculum will cover the Indiana State Standards in Reading Informational Texts, Reading Literary Texts, Writing, Speaking, and Listening. The curriculum aims to give teachers and Program Mentors instructional autonomy by allowing them to choose multiple resources as they present content to their students in a meaningful way. The goal is to develop readers, writers, and speakers who can critically analyze information from all content areas. Additionally, the K-3 curriculum will focus on Reading competency. Specific to the five modalities central to instruction at Colearn Academy Indiana:

1. Curriculum assignments: The curriculum modality will likely take the form of an online, adaptive reading system such as Lexia, Lalilo, or similar for K-8. Curriculum assignments for 9-12 students are presented in an asynchronous, online fashion and will be prepared by the Content Lead teachers or purchased from a vendor (who will align them to state standards).
2. Learning Projects: The learning projects modality will be included in every learning project across the curriculum, as reading and writing is an integral part of a learning project in any content area. Most learning projects across the curriculum involve a verbal presentation. For the elementary grades, these projects focus on imitation and repetition.
3. Collaborative Workshops: Our certificated, online teachers (called Content Lead teachers) will provide targeted, online, synchronous lessons that align with the Indiana State Standards and allow for student-to-student and student-to-teacher collaboration.
4. Experiential Learning: Our students engage with this modality through field trips. Every student will be given an opportunity to research before, take notes during, and then complete a written reflection after the field trip. 9-12 students also engage with this modality through professional internships. These internships require a written application, person-to-person spoken interactions, and reading/research as required by the specific internship.
5. Portfolio Development: Our Program Mentors will set aside time for our students to complete a "portfolio" of their learning. The elementary grades will typically do this by creating a photo or picture collage using Bulb, Google Photos or similar, and be given the opportunity to share their portfolio in a written or verbal fashion with other members of their family. Portfolios in the high school grades will be completed using our own, proprietary curriculum that guides the students through two-week cycles in which students focus on content and select a deliverable which is added to their portfolio at the end of the two-week cycle.

Math: CAI's math curriculum will be aligned to the state standards in all of the Mathematics domains. The curriculum aims to give teachers and Program Mentors instructional autonomy by allowing them to choose multiple resources as they present content to their students in a meaningful way. The goal is to develop students who engage with math in every facet of their life, and are not rote regurgitators of algorithms but instead understand the "why" behind the mathematical operations. Specific to the five modalities central to instruction at Colearn Academy Indiana:

1. Curriculum assignments: For K-8 students these will take the form of a complete, standards-based curriculum such as Math Mammoth, Saxon Math, or similar. These students will also use a variety of online tools, some of which are adaptive, including Prodigies Math, Dreambox, or similar. High school students will receive math instruction in an asynchronous, online fashion and these courses will be prepared by the Content Lead teachers or purchased from a vendor (who will align them to state standards).
2. Learning Projects: Students will complete grade-level-appropriate learning projects that allow them to focus on a real-world problem and create a solution to it. Younger students might try to determine how many pencils it would take to cross a room, while older students might be presented with an architecturally-themed project in which they compute a number of measurements/angles/etc. In the construction of their project. Students at CAI have the freedom to choose from among a curated collection of such projects, all of which are standards-aligned.
3. Collaborative Workshops: Our certificated, online teachers (called Content Lead teachers) will provide targeted, online, synchronous lessons that align with the Indiana State Standards and allow for student-to-student and student-to-teacher collaboration.
4. Experiential Learning: Our students engage with this modality through field trips. Field trips will incorporate math in several ways. They may be to locales that specialize in math-related activities. Students will also be expected to learn math in the planning of these activities ("How much will it cost?" How many vehicles are needed?", etc.) Students in grades 9-12 also

engage with this modality through professional internships. These internships require various math applications as required by the specific internship.

5. Portfolio Development: Program Mentors will set aside time for our students to complete a "portfolio" of their learning. The elementary grades will typically do this by creating a photo or picture collage using Bulb, Google Photos or similar, and completed math projects will be included. Portfolios in the high school grades will be completed using our own, proprietary curriculum that guides the students through two-week cycles in which students focus on content (in this case math) and select a deliverable which is added to their portfolio at the end of the two-week cycle.

Science: CAI's science curriculum will be aligned to the state standards, and will teach students the eight processes critical to scientific literacy (as found in the standards document). The curriculum aims to give teachers and Program Mentors instructional autonomy by allowing them to choose multiple resources as they present content to their students in a meaningful way. The goal is to develop student-scientists who use their science knowledge to explain the world around them, and develop a sense of wonder. Specific to the five modalities central to instruction at Colearn Academy Indiana:

1. Curriculum Assignments: K-8 students will experience science using a video and hands-on combination, such as Generation Genius or similar. High school students will receive science instruction in two ways. First, many high school courses have integrated science components. Second, students are taught in an asynchronous, online fashion and these courses will be prepared by the Content Lead teachers or purchased from a vendor (who will align them to state standards).
2. Learning Projects: Students will complete grade-level-appropriate learning projects that allow them to focus on a real-world problem and create a solution to it. Younger students might try to determine how the amount of sunlight affects the growth of a flower, while older students might be presented with an environmentally-themed project in which they design a plan to save/repair an ecosystem while paying careful attention to the adaptations necessary for animals to continue surviving. Students at CAI have the freedom to choose from among a curated collection of such projects, all of which are standards-aligned. Additionally, high school students may elect to participate in a job site internship, completing a project that aligns to state content standards and also authentically serves the business or organization. Examples abound for Science standards-embedded internship projects, especially in city health management, hospitals and health care, research and development in all fields, etc.
3. Collaborative Workshops: Our certificated, online teachers (called Content Lead teachers) will provide targeted, online, synchronous lessons that align with the Indiana State Standards and allow for student-to-student and student-to-teacher collaboration.
4. Experiential Learning: Our K-8 students engage with this modality through field trips. Field trips to locales that conduct science-specific activities will allow the students the opportunity to interact with science outside the classroom. Many of our 9-12 students will also find internships in science- and STEM-focused firms, such as construction, public utilities, animal management, etc.
5. Portfolio Development: Our Program Mentors will set aside time for our students to complete a "portfolio" of their learning. The elementary grades will typically do this by creating a photo or picture collage using Bulb, Google Photos or similar, and completed science projects will be included. Portfolios in the high school grades will be completed using our own, proprietary curriculum that guides the students through two-week cycles in which students focus on content (in this case science) and select a deliverable which is added to their portfolio at the end of the two-week cycle.

Social Studies: CAI's Social Studies curriculum will be aligned to the state standards, and will teach students the grade-level storylines and content foci in the core social science disciplines. The curriculum aims to give teachers and Program Mentors instructional autonomy by allowing them to choose multiple resources as they present content to their students in a meaningful way. The goal is to develop students who inquire about the world around them using the six elements of the inquiry arc as outlined in the Indiana standards. Specific to the five modalities central to instruction at Colearn Academy Indiana:

1. Curriculum Assignments: K-8 students will learn about social studies using a video- and literature-based combination, such as Curiosity Chronicles, Time for Learning, or similar. High school students will receive social studies instruction in two ways. First, many high school courses have integrated social studies components. Second, students are taught in an asynchronous, online fashion and these courses will be prepared by the Content Lead teachers or purchased from a vendor (who will align them to state standards).
2. Learning Projects: Students will complete grade-level-appropriate learning projects that allow them to focus on a real-world issue. Younger students might create a replica of a historically significant building, while older students might research a Native Population, creating a solution to a community challenge or producing an informative ad, article, live event, website

or blog, or public service announcement. Students at CAI have the freedom to choose from among a curated collection of such projects, all of which are standards-aligned.

3. Collaborative Workshops: Our certificated, online teachers (called Content Lead teachers) will provide targeted, online, synchronous lessons that align with the Indiana State Standards and allow for student-to-student and student-to-teacher collaboration.

4. Experiential Learning: Our K-8 students engage with this modality through field trips. For example, students might visit the building they selected as their learning project in Modality #2, or museums, etc. Many of our 9-12 students will find internships in social-studies-related fields, such as local/state government, etc.

5. Portfolio Development: Our Program Mentors will set aside time for our students to complete a "portfolio" of their learning. The elementary grades will typically do this by creating a photo or picture collage using Bulb, Google Photos or similar, and completed science projects will be included. Portfolios in the high school grades will be completed using our own, proprietary curriculum that guides the students through two-week cycles in which students focus on content (in this case science) and select a deliverable which is added to their portfolio at the end of the two-week cycle.

The instructional methods outlined above are CAI's way of operationalizing the five modalities, which themselves are created from research-proven teaching techniques. These methods also correspond to the techniques most frequently used (or desired to be used) in our target population of curious, engaged families. These families want more than just "book-" or "computer-" learning and instead want to connect learning with everyday life. Hands-on Learning, Project-based Learning, Experiential Learning, and portfolio reflections are modalities which aid not only in mastery of the core content but they also allow the students to gain critical thinking skills, all while allowing the student's family to be involved. In one short sentence, this is why we are applying for a charter — the instructional methods (which we call five modalities) mentioned above. We have found that there is no similar option available to our target population, and Colearn Academy Indiana seeks to rectify this.

Assessment Methods: This is an incredibly important component of CAI's potential for success. While we use "traditional" benchmarks, Indiana state assessments, and summative assessments to track student learning and mastery, we also provide a bevy of alternative options for summative and formative assessment. This is for several reasons. First, we truly believe in a holistic assessment strategy that allows all the different facets of a student's intelligence to shine through. Second, our target population of "curious, engaged families" is often rather suspect of the utility of state-mandated testing. It is for this reason that many choose to homeschool instead. We know that our mixture of traditional and holistic assessment techniques will allay many of these families' concerns while providing useful data necessary to ensure that all students are meeting content-area standards. This is good for families and students — they can be certain that their pupils are learning what they need to. It's good for Indiana — we can be sure that our future citizens have the skills needed to form a strong society.

5. If the programming is not already developed, provide, as **Attachment 2**, a plan for how it will be developed between approval of the application and the opening of the school, including who will be responsible and when key stages will be completed.

6. Describe the primary instructional strategies that the school will expect teachers to use and why they are well suited for the anticipated student population. Describe the methods and systems teachers will have for providing differentiated instruction to meet the needs of all students. Attendance policy described in a different section of the narrative below (highlighted yellow).

Teachers will follow best practices for online and blended learning. Through the strong partnership of teachers with Program Mentors (or family members), Program Mentors will facilitate more direct support for students. Curriculum and supplemental programs are designed to adapt to students and differentiate based on where students are on the learning continuum. Additionally, teachers will meet with Program Mentors at minimum monthly and provide coaching and mentoring of how to differentiate instruction for their learners, thus creating equitable education opportunities for all students based on their individual needs. Colearn Academy Indiana students benefit from:

- Scaffolded, project & portfolio-based learning
- Guided portfolio development practices
- Learning paths through appropriate, relevant content
- Live, synchronous sessions, facilitated through seminar style dialog
- Quality peer and near-peer interactions
- Responsive, caring instructors
- Guidance counseling

- College planning
- Personalized Learning Plans (PATHs)
- Embedded opportunities for socialization with peers, adult mentors and teachers
- Experiential learning through field trips, field research, and service-learning projects
- Options for students to have internships in their local community, completing projects aligned with content standards and meeting the needs of the business or organization where they are interning
- Support, resources, and learning opportunities for parents/guardians

Program Mentors may supply their own curriculum by submitting desired curriculum, as well as samples to showcase student progress aligned to Indiana Academic Standards. Students also have access to a variety of clickable curriculum in the Colearn Planner, including the following established curriculum that aligns with Indiana State Standards:

- Edgenuity/Imagine Learning
- Edmentum/Calvert

The following clickable curriculum will be used as supplemental and/or benchmarking material that will evolve and expand over time:

- Accelerate Education
- Kiddom
- Albert
- Legends of Learning
- Subject
- Minecraft Education Edition
- TypingAgent
- StudiesWeekly
- Duolingo
- i-Ready
- Lexia
- Reading Eggs
- Dreambox Learning
- GenerationGenius
- Dysolve
- Newsela
- Robotify
- Doyobi

Curriculum Choice

Colearn Academy's academic program is designed to provide flexibility and customization for each student's needs and to reflect student's interests, while meeting state level standards and academic goals. Program Mentors can utilize a blend of online learning platforms, textbooks, project based learning opportunities, literature, field trips, internships, and other resources to create a customized curriculum for their students. Colearn Academy students will receive additional support from an Education Specialist who will help customize educational opportunities to the student's preferred learning modalities. Education Specialists will act as a coach to lead students toward content mastery and engagement of learning through enriching, supported, experiential learning. Education Specialists will be available to students during specified office hours throughout the week, to provide academic assistance and guidance in specific subjects.

Colearn Academy CHOOSE YOUR LEARNER'S PATH		
Colearn's Full Curriculum	**Other Online Full Curriculum**	**At Home Curriculum**
Provided by Colearn Academy with a licensed teacher grading, overseeing, and maintaining an active role in the day-to-day tasks.	Provided by and monitored by the Program Mentor daily. *(Ex. Time4Learning, Miacademy, etc)*	Provided by and monitored by the Program Mentor daily.

REQUIREMENTS		
Students should plan on consistently working and progressing in the course in adherence to a pacing guide and target completion date. *Program Mentors can request access to Supplemental Programs as well to help close any achievement gaps the mentor and staff feel need to be addressed.*	Program Mentors can provide access to the teacher/parent portal to allow Colearn Staff to monitor the student's progress. OR Program Mentors can choose to have their student participate in Colearn's supplemental programs for staff to monitor for Academic Progress.	In addition to completing the at-home curriculum, students need to do one of the following: a) Complete 1 hour in both ELA and Math per week using Colearn's supplemental programs. OR b) Submit work samples weekly.
PROGRAM OPTIONS		
Colearn has partnered with Accelerate to provide a wide variety of Core and electives courses for students in K-12th grade. With the help of Education Specialists, Program Mentors are able to place their student in the best grade level per content.	Course Mentors in collaboration with an Education Specialist can create a customized online program using a variety of resources found on the Colearn app or approved vendor list. *Some options are available to pay with Enrichment Account.*	Lexia (reading) Dreambox (math) iReady Edmentum Edgenuity *Colearn offers a variety of at-home curriculum that can be purchased with Enrichment Account.*
OTHER REQUIREMENTS		
All paths require Program Mentors to track and report attendance weekly.		
All paths require students to participate in Benchmark Assessments and State Assessments.		
All paths require that a student show academic progress. If progress is not achieved, either the Course Mentor or Licensed Teacher may request additional student support through the Multi-Tiered Student Support process (MTSS). Students may be eligible for additional instruction or monitoring to ensure adequate academic progress.		

By allowing families to choose the curriculum, differentiation is naturally embedded, as parents are choosing what best fits the needs of their student. Within each curriculum, Program Mentors will receive support from Education Specialists to ensure students are meeting the expectations and standards aligned to the Indiana Academic Standards. Based on internal assessments, benchmark data, as well as weekly curriculum samples turned in by the Program Mentor, Education Specialists (content teachers) can quickly identify student mastery of standards and recommend any differentiation or best practices for skills, concepts, and standards to the Program Mentor.

7. **Replication Schools:** Explain the organization's approach to replicating and implementing the school model, including program and instructional design among multiple schools.

Not Applicable.

Pupil Performance Standards

Meets Standard Expectation
- Clear, rigorous learning standards (provided for one grade for each division the school would serve) and exit standards aligned with the Indiana Academic Standards (IAS).
- Thoughtful identification of and plan for development and adoption of any additional academic standards beyond state and authorizer that the school would adopt or develop, including explanation and evidence of how those standards would exceed the state standards.
- Clear, rigorous promotion and exit policies and standards.

Responses to the following items regarding the proposed school's pupil performance standards must be consistent with state and authorizer standards.

1. Address the priority standards, skills, and/or knowledge each student will be expected to attain by the end of one grade for each division served (elementary, middle, high school).

Colearn Academy Indiana will follow and prioritize the State of Indiana's learning standards, skills and knowledge that students are expected to attain at the conclusion of each grade level in order to advance to the next level, or in the case of 12th grade, graduate college and career ready.

Each year CAI will follow this process to analyze student data for all grade levels and divisions served to identify Standards in Essential Need of Support (SENS) and priority standards.
1. Data Analysis: Analyze ILEARN results and other summative assessment data to identify trends from the teaching and learning process of the previous school year, specifically strengths aligned to specific Indiana Academic Standards, as well as gaps.
2. Instructional Emphasis: Using curriculum maps, a focused set of priority standards will be determined based on the strengths and gaps in learning (SENS) identified through data analysis for each grade-level, content area, and course. An instructional timeline of priority standards will be developed to ensure gaps in learning are addressed and strengths are maintained. Adjustments to core curriculum will be made based on this data.
3. Assessment: Formative assessments will be used to monitor progress of Tier 1 instruction to ensure student progress toward meeting and exceeding grade-level priority standards in content areas and courses.
4. Monitoring: Based on formative assessment data, Education Specialists will provide instructional strategies for Program Mentors to support students at home or meet with students in small groups or individually to provide research-based instructional support for students who are not making progress towards the standards. Education Specialists will also provide resources for enrichment for students making progress towards the standards.
5. Maintaining Skills: Curriculum will be sequenced as such to have cyclical reviews of previous skills and priority standards to ensure students maintain those skills throughout the course.

Colearn Academy Indiana instructional staff will also partner with organizations, such as Keep Indiana Learning, for professional development and resources focused on ILEARN priority standards based on student data and supporting Education Specialists and Program Mentors in understanding ILEARN Priority Standards and Performance Level Descriptors. For students in high school, their graduation pathway towards a diploma or certificate will determine their course sequence and priority standards and SENS.

Utilizing key resources for assessment and monitoring progress is key to ensuring students master priority standards and close gaps on SENS. Mastery is achieved when a student can demonstrate proficiency in skills and content as described in grade level state standards. To ensure that students are on track to demonstrate mastery on state mandated summative assessments, formative assessment opportunities will be utilized in an ongoing manner. These assessments will provide teachers with the information required to monitor progress and adjust instruction.

Formative assessment will include:
● Qualitative and observational data obtained by teachers through student level interactions over Zoom and through live class and club settings.
● Embedded course assignments and assessments at the lesson and unit level (Example: Formative)
● Frequent, brief standards aligned short-cycle assessments sequenced to assess mastery of content recently learned, either independently or in a live class
● Local benchmark assessments administered 3 times per year
● Common mock assessments administered 3 times per year (Example: Edulastic)
● Quiz games and other forms of engaging assessment (Examples: Quizizz, Kahoot!, and 99math.)

The table below provides a summary of the assessments CAI proposes to utilize to monitor student performance:

Assessment Type	Platform/Tool
Local Benchmark/Diagnostic (Computer Adaptive Nationally Normed)	Example: iReady, Edulastic
Incoming Assessment	Example: iReady, Edulastic

Short Cycle Assessments (Progress Monitor)	Example: iReady (K-8), Lexia, Edulastic
Reading Fluency	Example: Dibels
Classroom Assessments	Examples: Formative, iReady Standards Mastery, Lexia Course assessments
State of Indiana Summative Assessments	ILEARN, I AM, IREAD-3, SAT, PSAT, WIDA ACCESS

When student level data indicates that a student is not on track for mastery of grade level content school staff will implement tiered academic interventions within a multi-tiered support system (MTSS). These supports will happen organically in the Colearn model, as courses are individually designed for each student. Students will work with Content Lead teachers and Program Mentors, along with support from home, to achieve mastery.

2. If you plan to adopt or develop additional academic standards beyond the state and/or authorizer standards, explain these additional standards, including the content areas and grade levels in which they will be implemented. Describe the adoption or development process that has taken place or will take place. Select one grade level and subject area as an example, and explain how these additional standards exceed the state and authorizer standards.

Each student will develop a portfolio of work throughout their learning experience with Colearn Academy Indiana. The portfolio will highlight the work and progress of the student. However, these assignments, projects, and reflections will align to the state standards as the portfolio is not an "extra" component but will reflect a culmination of how the student demonstrated mastery of standards throughout the school year based on the curriculum and enrichment selected by the student and families.

Each 9-12 student creates an annual portfolio of his/her work; produces deliverables for a public audience either through presentations, authentic and/or creative products, internships, publications, community projects, or competitions; and works collaboratively with other students and adult mentors to show mastery of learning competencies and personalized goals. Below are sample rubrics for an ELA and Social Studies Portfolio:.

- ELA Portfolio Rubric
- Social Studies Portfolio Rubric

Colearn Academy Indiana will work to create a Profile of a Graduate consistent with the mission of the Academy and the vision put forth in this charter, uniquely tailoring guidance from Colearn ESP to the local needs of the State of Indiana and the parent and student community. This will allow the Board, the Executive Director, the Experiential Lead, and all team members and partners to align various curricula and interdisciplinary experiences.

Colearn ESP will provide guidance that leans on several influential standards, frameworks, and conceptual models. These include the XQ Student Performance Framework, the OECD Learning Compass 2030, The OECD PISA Global Competence Framework, Battele for Kids' Partnership for 21st Century Learning, and Minerva University's Habits of Mind and Foundational Concepts.

K-8 students are assessed through a similar, albeit slightly less rigorous portfolio method. These students, with help from their adult mentors, use tools such as Bulb, Bookcreator.com or a Google Photos slideshow to record completion of their projects, share with others, and reflect on the work. This reflection time is crucial in deepening the cognitive gain accomplished from the completion of the projects.

3. Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents and students. Not applicable for those schools serving only 9th-12th grade.

The goal of Colearn Academy Indiana is to promote students through the grade levels after they have demonstrated mastery in the content areas presented in each grade level.

Students demonstrate mastery through the four "higher" learning modalities, while the minimum requirements to prevent retention are defined based upon their performance in the Colearn portal. This differentiates instruction and assessment by student and by core content area (reading, writing, mathematics, science and social studies). The platform assesses a student's competence in the Indiana State Standards for each grade level using adaptive levels that the student must complete and assessments that the student must pass.

While it is necessary to define the minimum requirements for retention/promotion, CAI recognizes that this exercise occurs only in the bottom two levels of Bloom's revised taxonomy: Understanding and Remembering. For this reason, CAI uses Lexia to provide an indication of minimum competence in a subject area, but encourages the students to spend much more time in the higher regions of Bloom's revised taxonomy.

CAI's unique learning philosophy seeks to empower students to remain in the upper levels: Analyzing, Evaluating, and Creating. Students are pushed into these upper levels by participating in the four "higher" modalities:
- Modality 2: Collaborative learning projects
- Modality 3: Synchronous interactive courses called collaborative learning workshops
- Modality 4: Experiential Learning Opportunities, to include iInternships in a professional environment for 9-12, and field trips for K-8 option
- Modality 5: Guided Pathway portfolio development

Minimum requirements for promotion to the next grade, however, are defined based upon their performance in the adaptive levels and assessments found in Freckle, which is a component of the first modality:
- Modality 1: Curriculum Assignments (content-specific and competency-based)

Below are our policies and standards for promoting students from one grade to the next:

Grades and Grading

Kindergarten through grade 8 receive grades based on a 4-point grading scale. Teachers look at Program Mentor feedback, formative and summative assessment data, attendance and participation to determine mastery of grade level standards.

1-Below Grade Level	2-Approaching Grade Level	3-At Grade Level	4-Above Grade Level
Student performs below grade level on assignments and assessments.	Student demonstrates partial mastery of grade level standards.	Student performs at grade level and shows general mastery of subject.	Student performs above grade level in standards and assessments.

For students in grades 9-12, all courses taught for credit receive a letter grade. Grade point averages (GPA) and the percentages used to determine each grade are listed below.

Percentage	Letter Grade	Achievement Grade	Grade Point Value
90-100	A	Consistently meets curriculum standards at an outstanding level	4.0
80-89	B	Generally meets curriculum standards at a high level	3.0
70-79	C	Meets curriculum standards at a satisfactory level	2.0
60-69	D	Meets some curriculum standards	1.0

<59	F	Fails to meet curriculum standards. No credit toward graduation is granted.	0.0

Grade Promotion and Retention
- K-5 students demonstrating insufficient progress or completion will have a parent/teacher/administrator conference which will determine if the student is eligible for promotion based upon their academic scores compared to the state standards for the grade level.
- K-8 EL students who do not pass the state assessment will not be retained unnecessarily.
- 6th, 7th and 8th grade students must pass all classes, both semesters in order to promote to the next grade level.
- 4th-8th grade students may participate in remediation programs for credit recovery.

Retention

If a decision is made to retain a student, CAI will review all student data — standardized test scores, benchmark assessments, content area grades, course assessments, outside activities and/or priorities, etc. — to determine the student's academic areas for improvement. This will assist the school in developing the appropriate academic support for the student. CAI will allocate resources for students who fail to progress, prioritizing students who will be retained if progress is not achieved. Students retained will be provided with intensive interventions to ameliorate the student's specific deficiency and prepare the student for promotion to the next grade.

If K-8 grade students are demonstrating adequate progress in one subject but not another, students will not be retained. Instead, the student will be promoted to the next grade with a referral to the school's RTI/MTSS team. The team will review all student data to determine the student's areas for improvement. This data will assist the school in developing the appropriate academic supports for the student. The student will be provided with intensive interventions via the Colearn portal to ameliorate the scholar's specific deficiency in that subject area. In the event that the student continues to demonstrate lack of progress in that specific subject area, a referral for special education services will be initiated to identify potential learning challenges.

If students in grades 9-12 are successful in one subject but are not in another, students will have the opportunity to repeat the subject area in a credit recovery format to meet the mandated state required credits for graduation.

Students with Disabilities

An Individual Education Plan (IEP), and/or 504 Plan, is assessed based on progress of goals and objectives.

Acceleration

A K-8 student who demonstrates competency in a grade level's adaptive levels and assessments may promote to the next grade level at an accelerated rate, provided the Content lead, Program Mentor, Experiential Learning Lead, and student all agree to the accelerated promotion schedule.

As delineated in Section A (above), promotion at the K-8 grade levels is defined by their performance in Modality 1. This is effective and suitable for this age group because students demonstrate comprehension of the Indiana State Standards in Modality 1. While the goal of Colearn Academy is to engage all students in the higher order thinking modalities (Modality 2-5) as much as possible, summative assessments such as projects and portfolios are learned modes of evaluation. Students need continual practice to grow and work towards success in these areas. Thus, their progression in this area will be scaffolded in order to prepare them for the ability to be summatively assessed in Modalities 2-5 once they reach grades 9-12.

At Colearn Academy Indiana the authority to retain a student rests jointly with the Content Lead, Program Mentor, and Experiential Learning Lead teachers. The teachers' decision may be overturned by the public education agency's governing board.

A key feature of CAI is the use of strategic, ongoing assessment and notification. The parents, students, teachers, and other stakeholders are continuously aware of a student's progress, due to the collaborative nature of our educational philosophy and use of online assessment tools.

At the first sign of potential student difficulty (identified by the Program Mentor), all interested parties will collectively examine the student's progress and issue a series of remediation actions. This step will also ensure that the student and his/her parents are aware of the student's academic progress as well as all interventions available. After this meeting, the Program Mentor will continue to document the student's progress toward achieving proficiency in the identified areas.

The Program Mentor, once again in consultation with the Content Lead and Experiential Lead teachers, will use this documentation when making decisions on student retention. As best practice, retention should only be recommended when all other options prove unsuccessful. Teachers need to demonstrate a plan was put in place and utilized to implement an appropriate instructional program. The plan must outline the criteria used to identify expected growth and demonstrate an intervention plan was developed by the instructional team. The student's report card will reflect a child's performance based on expected outcomes and will be included in the analysis of student progress.

For most struggling students, retention may not be a satisfactory solution. Colearn Academy will use data from assessments, teacher collaboration, and interventions to address student needs throughout the year in hopes to mitigate retaining students.

4. Provide, in **Attachment 3**, the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do. Not applicable for those schools serving only 9th-12th grade.

High School Graduation Requirements (High Schools Only)

Meets Standard Expectation
● Sound plan for meeting state and authorizer graduation requirements (including credits, GPA calculation, transcripts, electives) and compelling explanation of any additional requirements beyond the state's and authorizer's requirements.
● Clear, persuasive explanation of how the school's graduation requirements will ensure student readiness for college and other post-secondary opportunities (trade school, military service, or entering the workforce).
● Effective systems and structures for students at risk of dropping out or not meeting graduation requirements.

High schools will be expected to meet the state and authorizer graduation standards.

1. Describe how the school will meet state and/or authorizer requirements. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed state and authorizer standards, explain the additional requirements.

Colearn Academy Indiana will require all students to meet the state and authorizer requirements to graduate with a high school diploma. CAI will offer the following state approved diploma types: Indiana Core 40 and Honors Diploma, Indiana General Diploma, and Indiana Certificate of Completion.

All CAI students enrolled in grades 9-12 are required to enroll in a minimum of seven (7) credit hours per semester. Credit hours will be earned at the conclusion of the course and grade point averages (GPA) will be calculated at this time based on a 4.0 scale, which will be documented on transcripts. The process for awarding course credit is based upon successful completion of the course with a final grade of 70% or higher. The grading scale deems 90-100% as an "A", 80-89% as a "B", 70-79% as a "C", 60-69% as a "D", and 59% and below as an "F." Elective courses will be offered in the areas of world languages, fine arts, career and technical education, as well as those within the parent selected approved curriculum options.

The Matrix Tracking System for Integrated Courses or Multidisciplinary Projects
Colearn Academy Indiana high school transcripts will be formatted in a traditional, standardized format aligned to SIS configurations and college entrance expectations. However, the back-end tracking of course completion and how grades are earned will utilize a technology-enhanced matrix. This course requirement tracking matrix allows CAI to structure its educational program in a powerful, reform-based, non-sequential manner, serving as an active guidepost for the academic program of each individual student. Expectations for course completion and competency are uniform, but each student's journey of course completion is entirely unique.

The computerized tracking matrix has two elements or parts. Part A encompasses the full list of units, activities, and sample projects that are required for course completion, similar to a course syllabus or course outline.

Sample Matrix, Part A

TOPIC	UNITS	LABS MENU	SAMPLE ACTIVITIES & PROJECTS
Cell Biology	☐ Cell Chemistry ☐ Cell Structure ☐ Cellular Transport ☐ Cell Cycle ☐ Cellular Energy	☐ Specialized Cells ☐ Protozoan Observation ☐ Plant & Animal Cell ☐ Cell Analogy Lab ☐ Photosynthesis Lab	Microscope observation Cell variety project Bacterial cultures <u>Labs used at a vet clinic:</u> Hematocrit, Heartworm, Blood Tests, Fecal Tests, Lyme Tests <u>Labs used at a hospital:</u> Blood Oxygen, Blood iron, Blood Cell counts

Part B of the tracking matrix encompasses the individual student data and documentation of what they learned, when they learned it, and which credentialed teacher supervised and signed off on it. Part B ensures that grades are awarded by Highly Qualified Teachers.

Sample Matrix, Part B

Learning Outcomes	Questions used to put into project	Project(s) which include stated Learning Outcomes:	Attempts: Year & Semester	Advisor/ Teacher Initials	Date, Year, Sem
1.Students will prepare written research reports on biology topics of their choice and interest, with the approval of their instructor.	Can I formulate a research topic from my internship or independent project work? How will I choose references? How will I keep track of my references? How will I analyze sources for credibility?				

How the Matrix Course Description Will Be Used

Course Description Matrices are digital files organized by subject area. Once every quarter, teachers, Program Mentors, and the students themselves will review the evidence of what learning occurred, checking off the topics, units, labs, projects and learning outcomes that have been completed by the student. The final determination of what qualifies as "completed" shall be determined by the credentialed teacher in the aligned subject area.

All course Units will be completed, with a range of labs, activities and projects customized to each individual student. Each student will have a portfolio of unique projects as evidence of Unit completion. Rubrics will be used to assess the quality of student work as formative assessments. Students may spiral through the curriculum outlined in the course descriptions over multiple school years.

Once a student has started a course, i.e. has done one element of a course Topic or Unit, that course will be activated on the student transcript. If there's only one or two activities or units completed, it will show on the transcript with an "I" for Incomplete. Students are not penalized for Incompletes.

Once a student has completed 70 percent of a course's expected Units, the course will show on the student's transcript as a "C." Students are expected to complete all Units and activities for a course, and may do so over multiple years until they have earned an "A." For example: A 9th grade student who has an internship in a hospital lab may complete content learning for several Biology strands and concepts, as well as completing reading, research and writing standards from the 9th and 11th grade English class.

Grades are calculated using lesson formative assessments, unit and final summative assessments, and project and portfolio completion. Formative assessments include student engagement while in the instructional tier group, discussion boards, checkpoints, workbooks, and projects. Each course final exam or final project will represent 15 percent of the student's overall grade.

CAI also requires students to complete a portfolio. This requirement aligns to the Work Readiness requirement. Portfolios are a culmination of student work throughout high school, as well as connections to workforce readiness and career pathways. High school students also have opportunities for internships, however these are not a requirement, but used to enrich student learning and application. This program also supports a student's Employability Skills.

Suggested Sequence of Courses, High School (9-12)

ENGLISH

	9th Grade	10th Grade	11th Grade	12th Grade
Standard	English 9	English 10	English 11	English 12
Advanced	Honors English 9	Honors English 10	Honors English 11	Honors English 12

MATHEMATICS

	9th Grade	10th Grade	11th Grade	12th Grade
Standard	Algebra 1	Geometry	Algebra 2	Math 4
Advanced	Honors Geometry	Honors Algebra 2	Honors Precalculus	AP Calculus

SCIENCE

	9th Grade	10th Grade	11th Grade	12th Grade
Standard	Biology	Physical Science	Chemistry or other science	Physics or other science
Advanced	Honors Biology*	Honors or AP Chemistry	Honors or AP Physics	Other AP Lab Science

*Students enrolling in Honors Biology in the 9th grade must have successfully completed Algebra 1 prior to the 9th grade and are expected to continue on the "Advanced" Science sequence noted above.

SOCIAL STUDIES

	9th Grade	10th Grade	11th Grade	12th Grade
Standard	World History/ Geography	Social Studies elective	American History*	American Government (1 credit) and Principles of Economics (1 credit)
Advanced	Honors World History/ Geography	Honors American History and Literature	AP United States History and/or AP Social Studies elective	AP US Government and Politics** or AP Microeconomics and/or AP Macroeconomics

*Students must complete one credit of American/Arizona history before taking American Government or Principles and Practice of Economics.

**AP United States Government and Politics fulfills the requirements of government and economics necessary for high school graduation.

Here are course offerings:

- [Edgenuity/Imagine Indiana Course Catalog](#) (Grades 6-12)
- [Edmentum Course Catalog](#) (Grades 6-12)
- [Edmentum/Calvert Course Catalog](#) (Grades K-5)

2. Explain how the graduation requirements will ensure student readiness for college and/or careers.

Colearn Academy Indiana's graduation requirements will be aligned with the State Board of Education requirements for students in the Class of 2023 and beyond. Indiana's Core 40 diploma is the academic foundation all students need to succeed in college, apprenticeship programs, military training and the workforce. Core 40 gives students more options — and more opportunities — to find a career with a real future. Some four-year Indiana colleges – including IU Bloomington and Purdue West Lafayette – require the

Core 40 with Academic Honors. With this diploma, graduating seniors may be eligible for more financial aid from the State of Indiana. Plus, some Indiana colleges offer scholarships for students who have earned this diploma. The Colearn portal will be automatically populated with Indiana specific graduation pathway requirements and diploma types.

Beyond alignment with the Indiana graduation requirements, the design of CAI offers a variety of course options, enrichment and field trip activities, as well as internship opportunities to ensure actively engaged students who will meet the graduation requirements. Based on this model, CAI is confident all graduates will follow one of the following paths: enroll in a vocational or post-secondary education program, enlist in a branch of the military, or be gainfully employed.

To ensure graduates are prepared for one of these three paths, CAI is committed to supporting students in developing a post-secondary plan while in high school. This includes career exploration and opportunities for internships. CAI will also support students and families in developing a financial plan through scholarships, grants, and by completing the FAFSA. CAI will also support students in the application process for vocational, community college, and university applications, as well as enlisting in the military. Not all students will choose a college pathway, so CAI will be equipped to help students who wish to seek gainful employment with their applications, resumes, and the job search process, which partnerships with local businesses will aid in this process.

CAI believes that through the academic model, students will graduate with the workforce readiness skills required in today's market by developing a strong work ethic, time management skills, as well as critical thinking and communication with peers through a variety of opportunities for enrichment, field trips, and internships.

3. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

Identifying students at risk for dropping out or not meeting the graduation requirements on time is an important data point that will be monitored by Colearn Academy Indiana. CAI's Student Information System (SIS) will be automatically populated with Indiana specific graduation pathway requirements and diploma types, which will aid in monitoring student progress. The Colearn portal will clearly define a student's progress in any course with clear, detailed graphics:

In conjunction with the Colearn technology, Education Specialists will meet with parents or Program Mentors monthly and monitor student progress to ensure students are making adequate progress towards course completion and graduation requirements. Key indicators to identify at risk students are those who are credit deficient or who show gaps in knowledge on benchmarks. Education Specialists will look for these key data points and work with students and families to develop a plan to make up credits and graduate. Additionally, providing academic support for students who are behind on key academic skills is important to ensure students are college and career ready upon graduation. Because high school standards require high order critical thinking skills, CAI is naturally designed to provide opportunities for students to fill in gaps. Additionally, because of the design of CAI students have a variety of ways to show mastery of key standards. For students who have not been successful in traditional learning environments, students have opportunities to develop projects or show mastery in other forms.

Education Specialists will also host a weekly meeting – a formatted, facilitated check-in. Because of the familiarity of the term in education, we will use the name "Homeroom." Each learner will have a Homeroom taught by their family's Education Specialist.

The Education Specialist will serve Program Mentors, but also run Homerooms, and will have special technology tools that enable them to see progress across all subjects and all digital resources. This Homeroom Dashboard is custom built and provided through Colearn ESP, and it will algorithmically notify Program Mentors who are not marking things complete and not keeping up with their requirements. If they are more than one week behind, their family will be highlighted and the Education Specialist will be asked to take action.

Because CAI is a virtual school, students who are credit deficient can make credits up more quickly than in a traditional learning environment, and students who fail a course may recover credits at an accelerated pace. Education Specialists may work with students to develop a plan to make up credits to graduate on time or even early. When students visually see a plan that they can accomplish with timelines, they are less overwhelmed and defeated and can work towards that goal to successfully complete high school and meet the necessary graduation requirements. High school students will also have the opportunity for internships, which will provide purpose for learning for students and increase engagement.

School Calendar and Schedule

Meets Standard Expectation
- School calendar and sample daily and weekly schedules that meet minimum Indiana requirements, align with the educational program, and are conducive to significantly improving student learning.

1. Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program and/or anticipated student population. In **Attachment 4**, provide the school's proposed calendar for the first year of operation, including total number of days/hours of instruction. Instructional calendar guidance from the Indiana Department of Education can be found here.

Students enrolled in Colearn Academy Indiana (CAI) will be expected to focus on learning for the equivalent of extended school days with no dictated start or dismissal time. All learning occurs at home with their Program Mentor teacher. Students "may generate an average daily attendance of 1.0 for attendance hours during any hour of the day, during any day of the week and at any time between July 1 and June 30 of each fiscal year." We recommend students designate the following hours per day based on their grade level and a 200-day school year (with approximate start and end times in parenthesis):
- Kindergarten: 2 hours per day, 400 instructional hours per year (8 am-10:30 am)
- Grade 1-3: 3.6 hours per day, 720 instructional hours per year (8 am-12 pm)
- Grade 4-8: 4.6 hours per day, 920 instructional hours per year (8 am-1 pm)
- Grade 9-12: 6.9 hours per day, 1,387 instructional hours per year (8 am-3:30 pm)

Given the unique format, exact course start and end times will be determined by each Program Mentor, but will be between the hours of 8 am and 5 pm.

Time and Learning Requirements:

In order to meet the state's requirements for academic instructional time, students should complete the following minimum minutes of school each week. Families may choose how to organize a student's schedule.

How Attendance Works:

Program Mentors work with their Education Specialist (also called their Homeroom Teacher) to set up an ideal weekly routine in the Colearn Planner.

Program Mentors set up "Blocks" with their chosen curricula and resources, and fill their schedule based on the state requirements for daily attendance below.

Program Mentors check off the Blocks as they are completed. Or, the Learner can use their Launch screen to mark things complete on their own.

As things are marked Complete, the Education Specialist (Homeroom Teacher) can observe meeting attendance requirements. They approve the attendance records, and once they are approved they are submitted through an SIS compliant with Indiana's state reporting requirements.
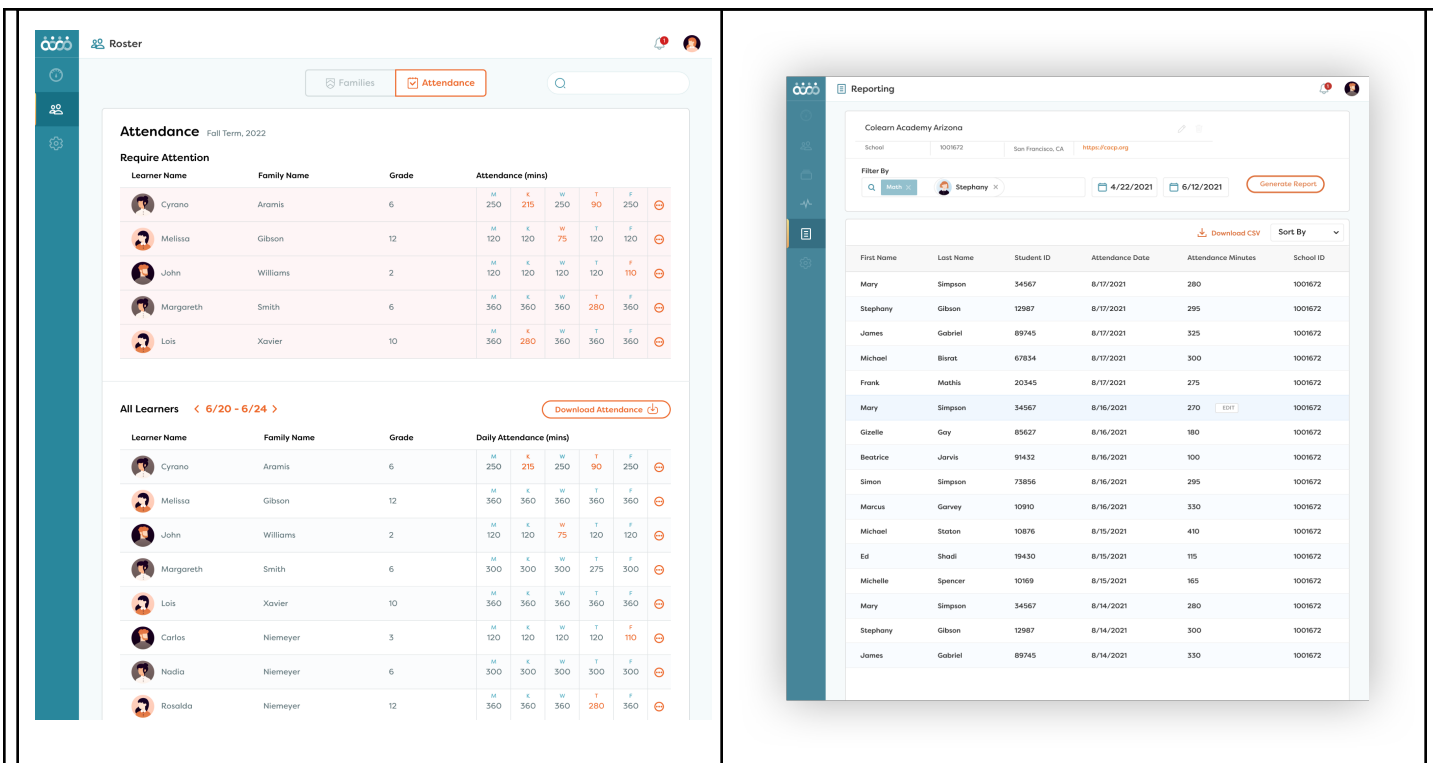
Kindergarten Students:

Every week, students in Kindergarten are expected to devote approximately 10 hours (2 hours per day) to focused school work, and will likely devote more time pursuing their personal/family interests. We recommend the following weekly regimen for our students:

- 480 minutes, 8 hours of core subjects
    - 120 minutes of Reading/Reading intervention (This should be spread out each day, ~25 min per day)
    - 80 minutes of Writing/Speaking/Language
    - 120 minutes of Math
    - 80 minutes of Science
    - 80 minutes of Social Studies
- 120 minutes, 2 hours Collaborative Workshops, Learning Projects, Experiential Learning

With a 200-day year, this means a student should have at least 400 hours per academic year of time focused on their learning.

Grade 1-3 Students:

Every week, students in grades 1-3 are expected to devote approximately 18 hours (3.6 hours per day) to focused school work, and will likely devote more time pursuing their personal/family interests. We recommend the following weekly regimen for our students:

- 720 minutes, 12 hours of core subjects
    - 90 minutes of Reading/Reading intervention (This should be spread out each day, ~15 min per day. Time will be increased to ~25 min per day minimum for students not making acceptable reading progress)
    - 90 minutes of Writing / Speaking/ Language
    - 180 minutes of Math
    - 180 minutes of Science
    - 180 minutes of Social Studies
- 360 minutes, 5 hours Collaborative Workshops, Learning Projects, Experiential Learning
- 60 minutes, 1 hour Portfolio and Reflection

With a 200-day year, this means a student should have at least 720 hours per academic year of time focused on their learning.

Grade 4-8 Students:

Every week, students in grades 4-8 are expected to devote approximately 23 hours (4.6 hours per day) to focused school work, and will likely devote more time pursuing their personal/family interests. We recommend the following weekly regimen for our students:

- 960 minutes, 16 hours of core subjects
  - 240 minutes of English Language Arts
  - 240 minutes of Math
  - 240 minutes of Science
  - 240 minutes of Social Studies
- 360 minutes, 6 hours Collaborative Workshops, Learning Projects, Experiential Learning
- 60 minutes, 1 hour Portfolio and Reflection

With a 200-day year, this means a student should have at least 920 hours per academic year of time focused on their learning.

Grade 9-12 Students:

Every week, students in grades 9-12 are expected to devote approximately 35 hours (7 hours per day) to focused school work, and will likely need to devote many more. We recommend the following weekly regimen for our students:

- 760 minutes, 12 hours of core subject areas — two 90 minute blocks to each.
  - 180 minutes, 3 hours of ELA
  - 180 minutes, 3 hours of Math
  - 180 minutes, 3 hours of Science
  - 180 minutes, 3 hours of Social Studies
- 360 minutes, 6 hours dedicated to dedicated interests.
  - Four 90 minute blocks, 6 hours for deep work
- 240 minutes for Collaborative Projects
  - Two 90 minute blocks, 3 hours for deep work
  - Two 30 minute blocks, 1 hour for Collaboration check-ins
- 210 minutes for Independent Projects
  - Two 90 minute blocks, 3 hours of deep work
  - One 30 minute, 0.5 hour for Collaboration check-ins
- 180 minutes, 3 hours for portfolio development
  - Two 90 minute blocks, 3 hours of deep work
- 120 minutes, 2 hours for discussion Seminars
  - Two one hour Seminars
- 120 minutes, 2 hours for Enrichment Experiences
  - Two one hour Enrichment Experiences
- 60 minutes, 1 hour to future ready curriculum developed by Colearn Club
- 60 minutes, 1 hour for Parent/Student Check-Ins
  - Two 30 minute Parent/Student Check-Ins

With a 200-day year, this means a student should have at least 1387 hours per academic year of time focused on their learning.

2. Describe the structure of the school day and week. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade.

Colearn Academy Indiana allows parents to determine the daily and weekly schedule that best supports the mastery-based learning of their child. CAI also provides a calendar or planner within the CAI portal to support planning instruction.

However, students enrolled in Colearn Academy Indiana are expected to focus on learning for the equivalent of extended school days with no dictated start or dismissal time. All learning occurs at home with their Program Mentor teacher. We recommend students designate the following hours per day based on their grade level and a 200-day school year (with approximate start and end times in parenthesis):

- Kindergarten: 2 hours per day, 400 instructional hours per year (8 am-10:30 am)
- Grade 1-3: 3.6 hours per day, 720 instructional hours per year (8 am-12 pm)
- Grade 4-8: 4.6 hours per day, 920 instructional hours per year (8 am-1 pm)
- Grade 9-12: 6.9 hours per day, 1,387 instructional hours per year (8 am-3:30 pm)

For all grade levels, the instructional hours per year exceeds the instructional time equivalent. Given the unique format, exact course start and end times will be determined by each Program Mentor, but will be between the hours of 8am and 5pm.

3. As **Attachment 5**, include a sample daily and weekly schedule for each division (elementary, middle, high school) of the school that identifies the number of instructional hours/minutes in a day in core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times.

School Culture

Meets Standard Expectation
● Vision for school culture or ethos that will promote high expectations, a positive academic environment and intellectual and social development for all students, including those with special needs, English Learners, and students at risk of academic failure.
● Coherent plan for establishing and maintaining the intended culture for students, teachers, administrators, and parents from the first day of school, and for enculturating students who enter the school mid-year.

1. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.

Colearn Academy Indiana will promote a positive school culture of engaged learners and families. Because of the freedom of choice within the program, students and families will have opportunities to truly customize learning experiences to the strengths and interests of each child. Students will be able to make real-world connections and application of their learning through enrichment activities, field trips, and project-based learning. High school students will have opportunities for internships to apply their learning and learn more about career paths. All of these programmatic opportunities promote deep intellectual and social development. The reality is that as adults, we have choices in our career paths, work environments, social networks, and more. By fostering a school environment with similar choices and opportunities, students and families have a role in the development of their academic environment in partnership with CAI. Through enrichment activities and field trips, students can put into practice the academics they have learned in an environment that creates opportunities for socialization. Students will be with students of similar interests and develop their social self through these program activities.

Based on all of these instructional and programmatic opportunities for students, a positive school culture and ethos will be developed within the CAI model. CAI sees families as partners in the education of their child, with CAI providing resources and support to facilitate an educational model to fit the needs of the target population and their families. While CAI has intentionally developed a model that offers virtual learning, it also blends opportunities for social development. By offering enrichment opportunities, field trips, and internships for high school students, CAI fosters connections to others, real-world application of learning, and intellectual and social development.

2. Explain how you will create and implement this culture for students, staff, and parents starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year.

Colearn Academy Indiana will provide an orientation and training for students, staff, and parents prior to the first day of school. To learn more about the school as parents enroll, everyone has an opportunity to meet with an Enrollment Coordinator for an overview of CAI, the program, and opportunities. This is the foundation of implementing the culture for students and families. By nature, the education program is designed for parent and student choices in partnership with the school, thus giving autonomy and control within the parameters of the overall requirements, such as standards and course requirements for graduation. When given choices, individuals feel valuable and in control of what is happening to them. They take more ownership and feel purpose. CAI is a partner and resource in the student's education — guiding students and families with menus of options for curriculum, enrichment activities, field trips, and internships. The students and parents are in the "driver's seat" making choices about their child's education. Even for students who enroll mid-year, the same opportunities are afforded to them. Learning to make choices and decisions is a life skill that promotes independence and higher order thinking skills to weigh the pros and cons for success in adulthood.

Colearn Academy Indiana will also require an annual family orientation for students and their parents to ensure families understand the requirements of CAI, as well as those requirements from the authorizer and state statute. Topics during orientation will include the following:

- selecting and navigating curriculum,
- Program Mentor Expectations,
- participation and attendance requirements and processes, including unexcused absences that result in being habitually truant and will result in being withdrawn, and residency
- notice of IC 35-46-1-4 regarding a person knowingly or intentionally depriving a dependent of education
- student engagement and counseling expectations and policies
- graduation requirements (as appropriate)
- enrichment and internship opportunities
- field trips
- navigating the Colearn portal

By maximizing an annual family orientation for CAI, parents and students will learn more about the Colearn culture, partnership between school and family, as well as the requirements of virtual learning. Families who enroll mid-year will also participate in the orientation, even when it is a smaller group.

School handbooks will provide information on school policies, expectations, grading and promotion, acceptable use of technology, and how to get assistance from their teacher and various departments at the school. All families will be required to sign off that they have received and read the school handbook.

It is worth noting to the authorizer, building a positive school culture is a fuzzy math problem. It is reliant on thousands, perhaps hundreds of thousands, perhaps millions of little collaborative decisions. It is most importantly reliant on people, on their relentless attitudes, their resilient focus, and their ebullient energy. That being said, there are consistent cultural practices, rituals, commitments, agreements, expectations, feedback frameworks, etc that all require methodical implementation and iteration.

3. Explain how the school will create an inclusive culture for the anticipated student population, taking into account student subgroups such as socioeconomic status, gender, race, ethnicity, English Learners, Gifted and Talented, Special Education, etc.

By design Colearn Academy Indiana is seeking to include various subgroup populations as our target population. All students and learners have access to the various components of the program, such as enrichment activities, field trips, and internships. These are not designated for specific populations of students nor do they have special requirements to be able to participate, making them accessible to all subgroups. Additionally, each student is allocated $600 that the parent may use for enrichment activities or supplies. These monies can be used for enrichment based on a list of CAI approved partners for activities, such as theater, karate, etc., or to order supplies, such as art supplies. Providing funds to all families levels the playing field so that any family can enroll their child in enriching activities to promote the development of their child regardless of socioeconomic status, gender, religion, race, or ethnicity. Because the parent can choose the activities, they can choose a program that best meets the needs of their child. However, CAI will facilitate lists of partners as some parents may not even be aware of the opportunities within their community for their child.

CAI is committed to identifying and serving students who have exceptional needs and are eligible to receive special education support and services. CAI is committed to ensuring that all eligible students with special needs receive a Free and Appropriate Public Education (FAPE) in the least restrictive environment.

CAI will comply with all applicable state and federal laws in serving students with disabilities, including but not limited to the Individuals with Disabilities Education Improvement Act of 2004 (IDEA), Title II of the Americans with Disabilities Act, and any other civil rights enforced by the U.S. Department of Education Office of Civil Rights (OCR), and all local and applicable special education policies and practices. Subject to any specific state limitations, the school complies with the requirements described in the IDEA, as well as state special education statutes, providing a FAPE to students requiring special education services. In general, this includes (but is not limited to) identifying and evaluating the needs of students with disabilities under the IDEA, developing Individualized Educational Programs (IEPs), determining appropriate placements for students with IEPs, and implementing IEPs in the educational placement determined necessary by the IEP team. To comply with state-specific standards and requirements, special education policies may vary from school to school.

If a parent makes a written request for an initial evaluation for special education services to the Director of Student Services, the school must respond no later than 15 school days after receiving the request. At that time, the school must give the parent prior written notice of whether it agrees or refuses to evaluate the student, along with a copy of the Notice of Procedural Safeguards. If the school agrees to evaluate the student, it must also give the parent the opportunity to give written consent for the evaluation. If a verbal request for a special education evaluation is made, the school is not required to respond to the 15 school-day timeline.

If the school decides to evaluate the student, it must complete the student's initial evaluation and evaluation report no later than 45 school days from the day it received a parent's written consent. If the student is unavailable to participate in the evaluation, the evaluation period will be extended by the number of school days equal to the number of school days the student is unavailable.

When a student initially enrolls in Colearn Academy with an existing IEP, the school either implements the IEP as written or provides the student with comparable services until a new IEP is developed by the IEP Team. Specially designed instruction for students with IEPs is delivered in virtual sessions. The IEP team determines the instructional program, modifications, and accommodations needed for students with disabilities, including the need for accessible instructional materials and assistive technology.

Colearn Academy complies with the National Instructional Materials Accessibility Standard (NIMAS). As of August 2006, federal law requires publishers of K-12 curriculum to provide a digital version of textbooks and other related materials. The IDEA established the format of these digital versions as the NIMAS. The NIMAS applies to printed textbooks and related printed core materials that are written and published primarily for use in elementary and secondary schools and are required by CAI for use by students. Students eligible to receive specialized formats produced by NIMAS files include students who are (a) blind (a visual acuity of 20/200 or less in the better eye after correction or fields less than 20 degrees), (b) visually impaired (a visual impairment with corrections and regardless of optical measurement that prevents the student from reading standard print), (c) physically disabled (a physical limitation that prevents the student from reading standard print), and (d) print disabled (having a reading disability resulting from an organic dysfunction and of sufficient severity that it prevents the student from reading printed materials). CAI assumes responsibility for providing accessible formats and assistive technology to students who need alternative access with these accommodations documented in an IEP or Section 504 plan.

Exceptional Student Services (ESS) Session Attendance
In order for students to make progress towards their IEP goals, it is important for students to attend all Special Education services provided and required by their IEP. Students who qualify for an IEP will receive services following the school calendar from August through May. Hours missed during the school year can be made up in June, with prior arrangements. Colearn's ESS services providers reserve time in their schedule and prepare for each student's prescribed services.

A student with a physical or mental impairment that substantially limits a major life activity, as defined by law, and who does not otherwise qualify for special education services, may qualify for protections under Section 504 of the Rehabilitation Act. Section 504 is a federal law designed to prohibit discrmination against individuals with disabilities.

When an evaluation is requested, a committee will be formed to determine whether the student needs services and supports under Section 504 in order to receive a Free Appropriate Public Education (FAPE), as defined in federal law.

Student Concerns
The Education Specialist is the primary contact for any concerns that a Program Mentor has regarding academic progress, behavior, or social emotional wellbeing. They will recommend any appropriate academic interventions and accommodations. In the event that additional concerns regarding student progress arise, the Program Mentor and/or Education Specialist can request a Student Study Team (SST) to be held. This meeting will document the concerns of school staff, the Program Mentor, and families, and will identify any interventions attempted and possibly recommend additional interventions. Interventions should be attempted for 6-8 weeks and a second SST meeting will be held to document the student's response to intervention. Depending on the outcome of the interventions, additional resources and recommendations may be made by the SST team.

The above process is referred to as MTSS (Multi-Tiered System of Supports), a systematic and comprehensive approach to student learning in which collaborative communities utilize a problem-solving and tiered framework to ensure high quality, differentiated, and

responsive instruction, enrichment, and intervention (academic and behavioral) for all students. The goal of MTSS at CAI is for 100 percent of our students to achieve at appropriate levels. If enough financial resources are available and the Board and the Executive Director choose, Colearn ESP may recommend an MTSS technology platform such as Panorama Education or Branching Minds.

Supplemental Programming

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

Colearn Academy Indiana will provide opportunities for enrichment and internships for students. Enrichment classes will be facilitated by CAI, as well as the opportunity for parents to choose enrichment outside of those offered by CAI. Enrichment classes offered by CAI will range in length from four weeks or eight week classes. CAI will also provide parents with $600 a year to use for enrichment outside of CAI to use on preferred partners in areas such as sports, theater, dance, coding, etc. Or parents can use the funds to purchase materials that enhance and enrich the learning experience for their child. Additionally, virtual and in-person field trips are offered twice a month for students. Students will also have ample opportunities to continue to participate in community based or club activities offered outside of the school's offerings and will be encouraged to do so.

2. Describe the programs and/or strategies to address student mental, emotional, and social health and development.

Colearn Academy Indiana's comprehensive school counseling program uses a "whole child" approach to address students' strengths and needs across all developmental domains, such as academics, social-emotional wellbeing, physical health, and family. The goal of the counseling program is to provide strategies and resources for nurturing the skills of self-regulation and personal and social awareness, enabling students to understand differences of all kinds, make connections, and problem solve. The counseling program is an integral piece of the Student Services department, which leverages the resources available in the school and the surrounding community to connect the right set of resources, supports, and opportunities with the right student and family at the right time.

CAI's counseling program provides multi-tiered, collaborative SEL instruction with direction and oversight from the Director of Student Services, who is a certified school counselor and wellness professional. Initial and periodic needs assessments will be used to evaluate student wellbeing, guide our targeted interventions, and measure the impact of our SEL approach over time. At the Tier 1 level, our certified teaching staff provides weekly virtual SEL enrichment using a variety of resources and curricula, i.e., Studies Weekly Wellbeing publications, Changing Perspectives SEL curriculum, state career development and job skills exploration platform, etc. Additionally, CAI provides a variety of experiential learning/enrichment opportunities that promote physical activity and social interaction. Tier 2 and 3 counseling interventions are provided by a certified school counselor and include small group and individual counseling. Additionally, counseling open office hours are available for all Colearn students and Course Mentors. The Colearn counselor does NOT provide clinical counseling services, but can provide behavioral health resources and referrals if needed.

Our counselors may work with the Colearn ESP Director of Student Services to select from various SEL services and programs. For example, The Contentment Foundation is an evidence-based program developed at Yale University.

Remote Learning (Not Applicable for Virtual Model Schools)

1. Describe how the school will incorporate digital or remote learning into the regular school calendar or in place of inclement weather days that would cause a school cancellation. Include the types of resources and/or programs the school will utilize to ensure instruction and learning continues. Further guidance on Indiana's digital learning department can be found here: https://www.doe.in.gov/elearning

Not Applicable. As a virtual school, remote learning is the learning environment.

2. Outline the expectations for teachers on a remote learning day, including planning of activities, lesson delivery, communication with students and families, office hours, etc.

Not Applicable.

3. Outline the expectations for students on a remote learning day, including possible daily schedules, time spent on tasks based on grade level, etc.

Not Applicable.

4. Describe how the school will provide continued services, track compensatory hours should they be needed, or create IEPs and ILPs with specific language surrounding remote learning days.

Not Applicable.

Special Populations

Meets Standard Expectation
- Demonstrated understanding of – and capacity to fulfill – state and federal obligations and requirements pertaining to students with disabilities, students identified as intellectually gifted, and English Learners (ELs), including appropriate discipline procedures for students with disabilities.
- Sound explanation of evidence from which the projection of anticipated special populations was derived.
- Comprehensive and compelling plan for appropriate identification of students who are performing below grade level or at risk of academic failure or dropping out and a detailed plan for providing services to such students.
- Comprehensive and compelling plan for appropriate identification of students with special needs to ensure they are served in the least restrictive environment possible, have appropriate access to the general education curriculum and school wide educational, extra-curricular, and culture-building activities in ways that support their development, receive required and appropriate support services as outlined in their IEPs and/or 504 plans, and participate in standardized testing.
- Comprehensive and compelling plan for providing services to ELs, including methods for appropriate identification, specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the general education curriculum and core academic program for these students, plans for monitoring and evaluating student progress and success of ELs and for exiting them from services, and plan for including ELs in standardized testing and school wide educational, extra-curricular, and culture-building activities
- Plans describe evidence-based instructional programs and practices; effective design or adaptation of the educational program; qualified staffing; and support strategies and resources.

1. Explain the methods used to identify the following special populations of students:
    - Special Education
    - English Learners
    - Below Grade Level Performance
    - Gifted and Talented

Colearn Academy Indiana will use multiple approaches and processes to identify special populations of students to best support their needs. CAI believes our model naturally supports a diverse learner population through the instructional model. Some special populations of students will be identified through their academic records from previous schools and/or the Home Language Survey. Additionally Teachers will follow the Child Find Process to identify those who may have not been identified in previous learning environments. Data from many of the curriculum and enrichment resources will also indicate students who may have gaps in learning, need additional support or accommodations, or who are gifted and talented.

The model of CAI also encourages strong connections and partnerships with families. Through the role of the Education Specialist (or Homeroom Teacher) who provides support to the family or Program Mentor, strong rapport will be built. This is another opportunity through these monthly meetings for the Education Specialist to provide coaching and mentoring to the parent, as well as watch student projects. Because the Education Specialist will be checking in with the Program Mentor or parent regularly, there is an additional layer of opportunity to identify students who may need special programs or support.

Content Lead Teachers also monitor the progress of students on their academics to ensure they are progressing based on the standards. Data is monitored and used to support students and Program Mentors to ensure academic progress and growth. Data comes from a variety of sources, such as online education resources, curriculum, as well as benchmarks.

Additionally, if teachers or parents have concerns regarding a student, the following process is implemented:

NEW Student Concerns:
1. Send Initial Screener Survey to all families at BOY
2. If parent responds 'YES, I have concerns for at least one of my students,' teacher and parent complete the 45-day screener together at PTC (September, or as needed)
3. SST meets monthly to review
   a. Referring teacher presents student concern(s), interventions tried, outcome
   b. Team reviews baseline data
      i. What is the problem?
      ii. Why is the problem occurring?
      iii. What are we going to do about it? (Instructional decisions, plan, create intervention bank)
         1. Implement Tier 2 or 3 interventions = MTSS Referral Form
         2. -OR- continue with Tier 1 interventions
   c. Team sets SMART goal(s), develops intervention plan(s), assigns responsibilities
4. Schedule follow-up*
5. Maintain communication with parents about student progress and learning needs

IN-PROGRESS Student Concerns:
1. Progress is monitored after 4-6 weeks of intervention
   a. Is the intervention working (what is the RTI?)
      i. If positive: return to lower tier intervention
      ii. If questionable or poor: evaluate fidelity of implementation, modify intervention, move to next tier intervention, recommend additional testing

Tier I: focuses on Quality Core Instruction and support that meet the academic needs of all students. Tier I instruction consists of scientific, research-based programs and frameworks that align to state standards and best practices proven to be effective for all students.

Tier II: involves extra instruction and support beyond Tier I that serve students identified as needing more help. Often, this help is provided to these children in small groups. These students require strategic interventions that match their learning styles and additional support in addition to the core curriculum.

Tier III interventions are more intensive and longer in duration. Tier III requires that academic and behavioral supports adjust to the student's response to Quality Core Instruction and previous interventions. Tier III supports all students in need of individualized, intensive strategies to achieve or maintain desired student outcomes and prevent future difficulties.

Students who Enroll with an IEP or 504 Plan:
During enrollment, families will inform Colearn Academy Indiana if their child has an IEP or 504 Plan. The parent/guardian may provide a copy of the documents or CAI will obtain the documents from the previous school. Upon enrollment, the special education

team will review the evaluation report and IEP from the previous school district. After consultation with the student's parent/guardian, the school will immediately implement the student's existing IEP, including any comparable services. A case conference committee will be convened within 10 instructional days of enrollment to adopt or amend the existing IEP (Per 511 IAC 7-42-5(a)(3)). For a student with an existing 504 Plan, CAI will convene a 504 team meeting with the parent/guardian as soon as possible, but no later than 30 days after enrollment. In addition to being active participants in the case conference committee and 504 team meetings, the parent/guardian will be provided with a copy of the Procedural Safeguards Notice.

CAI will have a continuum of special education services and range of placements available to ensure it is providing a free appropriate public education (FAPE) in the least restrictive environment (LRE). Related services (for example: occupational or physical therapy, counseling) will be provided face-to-face, via computer, in homes, community sites, and/or therapist offices, depending on the needs of each individual student and as provided in the student's IEP.

Contracting through a provider such as Virtually ConnectEd will provide the adequate and qualified staffing to meet the needs of special populations and IEPs. A service provider will be able to quickly scale staffing to ensure compliance for IEPs and to meet the needs of students and their individual goals.

English Learners (ELs):
Colearn Academy Indiana will meet the needs of English Language Learners as required by State and Federal law. The school will seek to employ teachers with the formal qualification of English As A New Language (ENL) Professional License who will serve as the EL Teacher of Record.

Gifted Students:
Gifted and high ability students will thrive at Colearn Academy Indiana. Indiana defines high ability students are those who (1) perform at, or show the potential for performing at, an outstanding level of accomplishment in at least one domain when compared to other students of the same age, experience, or environment; and: (2) are characterized by exceptional gifts, talents, motivation, or interests. To identify high ability or gifted students based on the following criteria based on requirements from the Indiana Department of Education:

Language Arts and Math: 96th percentile or higher (using local norms) on a norm referenced test of verbal reasoning ability OR: 96th percentile or higher (using local norms) on both the Reading and Language Arts subtests of an individual or group standardized norm-referenced achievement test. OR: Performed within the standard error of measure of 96th percentile (using local norms) on either the norm-referenced measure of verbal reasoning ability or the norm-referenced measure of achievement in language arts AND demonstrated outstanding potential or performance in language arts according to district criteria on a qualitative measure of assessment specific to language arts such as: product or portfolio assessment, rating or observation scales, interviews, or performance assessment.
General Intellectual: Has met the criteria to be identified for both language arts and math

Through the identification and placement process, these learners will be provided the most appropriate grade-level curriculum, pacing and teaching approaches from day one. For example, if a 4rth grader tests at the 6th grade level in math, the student will be enrolled in the 6th grade level math curriculum. Content Lead Teachers will work closely with Program Mentors or parent/guardian, and the Colearn portal will be individualized to ensure a steady flow of enrichment activities for students working above grade level. Students will further benefit from the advantages of virtual gifted education as they will be able to work significantly above grade level without the restraints of traditional school classroom pacing.

2. Describe the instructional programs, practices, and strategies the school will employ to provide necessary academic support and/or enhancements for the anticipated special populations of students being served.

For students with an IEP, Colearn Academy Indiana will contract with Virtually ConnectEd, or a similar provider, to service the needs of a student's IEP or English learners. Virtually ConnectEd will ensure compliance of the student's IEP, help with accommodations or modifications, as well as provide related services such as speech, occupational therapy, or other services indicated in the student's IEP. Many of the instructional curriculum or resources available for families to use have built in tools to modify or accommodate based on the needs of a student.

For example, Lexia (a reading program) begins with a diagnostic assessment to identify any gaps in a student's reading skills. The program then develops an individualized plan for the student to close any skill gaps. The program is designed for the student to work autonomously, however if a student does not progress on a specific skill, the program will generate a "red flag" for the teacher who monitors the program and will then generate a lesson to be printed and delivered one-on-one to the student offline. These lessons are scripted and provide targeted intervention for the student. In a traditional learning environment, these lessons may be delivered to the student by an interventionist or paraprofessional.

At CAI, this type of lesson would be delivered by the Program Mentor, who we see as an extension of the classroom and support to the Education Specialist or Content Lead Teacher. The majority of the programs available for students include components similar to the example from Lexia to support all learners' needs. Additionally, because students are able to progress at their own pace, students who are gifted and talented have an opportunity to complete projects or dig deeper into the rigors of the content they are learning. They can choose enrichment that allows them to have multi-dimensional learning experiences and pursue independent projects that best meet their needs and interests, thus allowing ownership of their learning. Through the CAI model, these students have an opportunity to reach deeper levels of learning by synthesizing and evaluating content. Student progress will also be monitored through the following MTSS process explained in detail above.

3. Identify how the success of the instructional programs, practices, and strategies, described in the question above, will be measured.

By philosophy and design, Colearn Academy Indiana uses a variety of performance indicators to assess student learning and ensure success of instructional programs, practices, and strategies. Each student in grades 9-12 creates an annual portfolio of their work; produce deliverables for a public audience either through presentations, authentic and/or creative products, internships, publications, community projects, or competitions; and work collaboratively with other students and adult mentors to show mastery of learning competencies and personalized goals. K-8 students are assessed through a similar, albeit slightly less rigorous portfolio method. These students, with help from their adult mentors, use tools such as Bulb, Bookcreator.com, or a Google Photos slideshow to record completion of their projects, share with others, and reflect on the work. This reflection time is crucial in deepening the cognitive gain accomplished from the completion of the projects.

CAI does not "teach to the test," though it does use formative assessments as important data points. "Rather than relying solely on standardized tests, we now have the ability to keep track of what happens to students. And rather than relying on standardized proficiency targets, districts, schools and students can use better information to create individualized growth targets." CAI uses a personalized student dashboard to track student interests, strengths, aptitudes, learning goals, and experiential learning — which carry more meaning and insight than the scores of a standardized assessment. The most analogous assessment regime comes from the New York Performance Standards Consortium. The consortium lists their global rubrics for performance assessment across the curriculum. In her book The Test, Anya Kamanetz summarized "Performance Assessment Consortium schools in New York City have nearly identical demographics to the city's public schools as a whole in terms of poverty, minority groups, English language learners, and those with disabilities. But their five year graduation rate is 10 percentage points higher — 76 percent vs. 66.1 percent, their dropout rate is 5.3 percent vs. 11.8 percent. And their graduates are far more likely to stay in college: 93 percent make it to their sophomore year, compared to 80 percent across New York State."

CAI operates with the testing philosophy that: "You don't drive by staring at the dashboard, you mostly keep your eyes on the road." The students' learning journeys, informed by adult mentors who know the students well and find creative, authentic, experiential learning opportunities to engage the student and assess growth using real-world standards, is where we place the most attention — that's the road to life-long success.

4. Summarize the plans to have adequate, qualified staffing for the anticipated special populations listed above.

Contracting through a provider such as Virtually ConnectEd will provide the adequate and qualified staffing to meet the needs of special populations and IEPs. A service provider will be able to quickly scale staffing to ensure compliance for IEPs and to meet the needs of students and their individual goals. CAI has researched Indiana based Special Education service providers to contract with in the case Virtually ConnectEd is unable to provide the staffing necessary to meet the needs of the special populations enrolled at Colearn Academy Indiana. CAI will contract with another viable provider or hire the qualified staff needed to meet the needs of the

special populations as outlined in their IEPs and to best support the needs of the individual learners. Qualified providers in speech, occupational, and physical therapy, as well as other related services and special education teachers will have experience ranging from early intervention to developing transition plans and services for high school age students.

Kim Phillips, Colearn's Director of Growth and Expansion, has met with Rachel Rutiledge, who owns a OT and PT practice in Indianapolis. Her providers offer services in a variety of settings — concierge, mobile in-home, public and private school based, homeschool based, early intervention and transition to adulthood. They have extensive experience providing services virtually. They currently contract with charter schools in Indiana. In addition, Kim has met with Amanda Owens, a speech and language pathologist in Indiana, who is experienced with providing virtual services. Amanda runs a SPED provider network and has access to a variety of providers and is well networked within the community. Both Rachel and Amanda have a full understanding of SPED services in Indiana, as well as billing and law.

Student Recruitment and Enrollment

Meets Standard Expectation
- Enrollment Policy complies with state law and ensures that the school will be open to all eligible students.
- New-Start Models: Sound and thoughtful student recruitment and marketing plan, timeline, and Enrollment Policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure.
- Phase-In or Takeover Models: Plans for engagement of students, families and the community that are realistic and likely to foster student retention and community support.

1. **New Schools:** Explain the plan for student recruitment and marketing that will provide equal access to interested students and families. Specifically describe the plan for outreach to families in poverty; families with language barriers; academically low-achieving students; students with disabilities; and other youth at risk of academic failure.

    Takeover Schools: Explain the plan for student and parent investment in the school turnaround, especially how the school plans to ensure parents and students do not opt out of the new school. Describe how this plan will successfully transition and retain students who currently attend or are zoned to attend the school being replaced. Provide a detailed description of the plan to gain parent and community support.

Colearn Academy Indiana is working to develop key partnerships with local groups within Indiana communities. CAI is focused on supporting homeschool families and agricultural communities within rural Indiana. CAI has begun through marketing efforts on social media, as well as meeting with key stakeholders of local groups supporting homeschool families and those with students with special needs.

The CAI team has been creating relationships with service providers in Indiana, Facebook group leaders, and local educational businesses. This has been accomplished by meeting with leaders in these areas to foster relationships, provide info about the CAI program, and to keep them updated on CAI's charter application progress. CAI has also been interfacing in Facebook groups with homeschooling families, providing answers to questions, referrals, etc. CAI has been hosting free events for the homeschooling community in Indiana, as well as free Parent Workshops for homeschooling families. Additionally, CAI is targeting parents of preschoolers to provide information on the CAI model for when their children are school age. CAI has also been reaching out to local farmers and agricultural leaders, to create partnerships and opportunities for students in rural Indiana. Letters of support have been provided as attachments to indicate the local community support across the state of Indiana.

CAI is committed to continuing to build these connections and partnerships to spread the word and educate community members on the model CAI offers students and families. By identifying key community groups, CAI is able to reach a wider community for enrollment efforts and marketing.

2. Provide, as **Attachment 6**, the school's Enrollment Policy, which should include the following:
    - Tentative dates for application period; and enrollment deadlines and procedures, including explanation of how the school will receive and process Intent to Enroll forms;
    - A timeline and plan for student recruitment/engagement and enrollment;
    - Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers; and

- Explanation of the purpose of any pre-admission activities for students or parents.

Student Discipline

> **Meets Standard Expectation**
> - Student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights. Legally sound policies for student discipline, suspension and expulsion, as well as appeals, including proper processes for students with disabilities.

1. Describe, in detail, the school's approach to student discipline. Provide as **Attachment 7** the school's proposed discipline policy. The proposed policy must comply with any applicable state laws and authorizer policies. The description of the school's approach and the proposed policy should address each of the following:
   - Practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior;
   - A list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively;
   - An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings; and
   - Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for more than ten days.

Colearn Academy Indiana believes in a proactive and positive approach to discipline. Through the educational program design with its foundation in student choice, students have positive opportunities to look forward to participating. Additionally, because CAI is a virtual online learning experience, students are working from home and not in a traditional environment. Students have the opportunity to take breaks, including movement throughout their day and scheduling their learning to best meet their needs. This reduces the opportunity for "disciplinary infractions" that are typical in a traditional environment. Parents also serve as the Program Mentors and monitor student behavior at home. Within an online learning environment, the primary offenses are typically related to academic dishonesty.

For students with disabilities, disciplinary actions and proceedings will follow IDEA requirements. Per the Student Handbook, discipline is addressed in the following way:

Student Expectations

Students of Colearn Academy Indiana must be engaged in curriculum, show weekly evidence of learning, and participate in state testing. Student learning is our focus at CAI. As a diverse community of learners, students must strive to work together in a respectful setting that facilitates our commitment to academic inquiry and reflection. With this in mind, the following behaviors are expected from Colearn students:

- Participation in group dialogue requires respect and mutual consideration of the opinions and ideas of fellow students.
- Offensive comments, language and gestures are not a part of our learning environment.
- Impersonating another person within an online platform is prohibited.
- Students must not share their username and passwords with other students.

An infraction of these expectations that is deemed to be disruptive to the learning environment is cause for removal of a student from an activity, and may result in disciplinary action.

Cultural Values

The "colearning" model requires a belief that "disciplinary procedures" are a measure of last resort, and that if they are common it is a signal that more systemic challenges must be addressed. Behavior requiring disciplinary action are a "lagging indicator" – the leading indicators are cultural, organizational, and human.

As a result, Colearn Academy Indiana plans to adopt the following cultural values for all stakeholders — instructional and administrative staff, as well as Program Mentors and students:

- Catalytic Curiosity
- Imaginative Inquiry
- Enthusiastic Engagement
- Deliberate Dedication
- Purposeful Persistence
- Integrated Independence
- Active Accountability
- Model Maturity
- Rigorous Responsibility
- Outward Ownership
- Continuous Contribution
- Aspiring Achievement

During Program Mentor and Student onboarding, all community participants will come to understand these values and their deeper meaning, their implications, and their importance in the community culture. Behavior that is seen as inconsistent with these values will be noticed, and the instructional team will have a low-stakes one on one with the student and ask to review these values and point to ones where they feel they might improve and give examples of how they might improve. If the inconsistent behavior continues, they will be asked to follow up in written form. This is described more in the "Self-Evaluations" section below. If the inconsistent behavior continues for a third time worth bringing up, the teacher, counselor, or relevant staff member will contact the Program Mentor and set up a meeting. If inconsistent behaviors continue beyond that, a more formal disciplinary process discussed below in the Discipline Process will commence.

A List of example Student Behaviors that may Catalyze a Discipline Process:
- Consistent online or verbal bullying
- Consistent lack of participation in virtual and experiential learning coupled with two or more weeks of not meeting attendance requirements
- Consistent failure to complete class assignments, self-paced curriculum activities, or provide work samples
- Consistent disrespectful communication to other students, teachers, Program Mentors, or staff
- Failure to attend or make up required state assessments
- Program Mentor misuse or misappropriation of enrichment funds

Discipline Process

Appropriate conduct is expected of all students at the school. Students are guaranteed due process of law as required by the 14th Amendment of the United States Constitution. A parent/student that fails to comply with the above expectations is in violation of school policy. In order to maintain active student status at CAI, all students will be monitored for academic participation and engagement. It is the Program Mentor's responsibility, in partnership with the school, to ensure that students meet these requirements. Students not found in compliance may be placed on academic probation. Disciplinary responses, when called for, will be determined at the discretion of school leadership. Suspension or dismissal may be warranted particularly when behaviors demonstrate a serious disregard for the welfare of other individuals or the community as a whole.

Experimentation with Student-Led Cooperative and Governance Entities for Positive School Culture

Colearn ESP to design and draft a student-led, student driven governance and judicial model that should be capable of handling various minor to intermediate cases of disciplinary hearings. While no student-led entity can maturely handle private information, family trauma, serious infractions, chronic behavioral issues, or cases that need professional attention, there are many day to day time consuming challenges that plague typical schools and burnout typical teachers that peer bodies, governance, and judicial entities could be perfectly capable of handling (at least in their first instances).

A Focus on Self-Evaluations

The Colearn model is to focus on Self-Evaluations, with a performance-review, journal entry-like approach. Values, Beliefs, and Goals are commonly shared and discussed, and widely known. When learners are not upholding those values and beliefs, and are not meeting those goals, they are asked to reflect on why and how they might do better in the future. This process often solves for itself.

Parent and Community Involvement

> **Meets Standard Expectation**
> ● Effective strategies for informing parents and the community about the school's development.
> ● Sound pre- and post-opening parent engagement plan, including family-school partnerships, that is welcoming and accessible to all parents.
> ● Community resources and partnerships that will benefit students and parents and that include a) description of the nature, purposes, terms, and scope of services of any such partnerships; and b) evidence of commitment from identified community partners.

1. Describe the role to date of any parents and community members involved in developing the proposed school(s). Include any opportunities parents and community members have had to provide feedback on the proposed school(s).

Colearn Academy Indiana was founded on the belief that parents are partners in their child's education. This belief filters down to the fact that parents can serve as the child's Program Mentor. Because parents are seen as an integral component of the education program, parents and community members have had ample opportunity to provide input and feedback during informational meetings. We believe that listening to parent input and surveys is key to the design of our programs to meet the needs of students. Additionally, because the parent company of the newly formed Education Services Provider has effectively implemented a charter school in another state, there has been ample opportunity to take parent feedback from similar targeted communities, such as the homeschool community, to make adjustments and refine the implementation of the educational program.

Colearn Academy Indiana has spent the summer of 2022 offering free events to parents and students in Indiana to gain support within the homeschooling community. Here are some examples of events held in the state:
- Animal Adventures with Jungle Jill: A program for students introducing animals from around the world.
- Live from India: A live event featuring a homeschooling family in India, sharing the food, culture, and fun facts about living abroad.
- Handbells with Mrs. Pam: An event teaching students the art of handbells with Pam Stumpf of Stumpf Music Studios.
- A Place to Belong: Author Amber O'Neal Johnson spoke about her latest book and incorporating an inclusive learning environment in the home and world.
- Teaching Reading with Less Stress: Speech Pathologist Amanda Owens taught strategies for teaching phonics to early readers.
- Home Education 101: Jamie Heston spoke on getting started with home education, choosing curriculum, and strategies to implement a successful education within the home.
- Curriculum 101: Amber Robinson and Jessica Cifuentes (of Colearn Academy Arizona) provided an overview of popular home curriculum with guidance on choosing the right curriculum for students.
- Planning For High School: Rachel Alm, Director of Student Services at Colearn Academy Arizona, provided an overview for families on choosing a path in high school and planning for the future, with an emphasis on college and career readiness.
- Learning with Minecraft: Guatam Bhargava, CEO of Ender, spoke with parents on the educational benefits of Minecraft.
- Empowering Children in Writing: Popular author, Julie Bogart of Brave Writer, gave parents strategies to incorporate into their writing lessons.
- Building a Routine for Your Family: Michael Staton gave an overview of the Colearn planner, with instructions on how to use it to build a strong routine for home-educating families.
- Nutrition Strategies for Learning: Sarah Galbreth gave an overview of the role of nutrition in learning, and how to incorporate a healthy diet into daily life.
- Country Music Hall of Fame Virtual Field Trip: A journey through the history of music with a tour guide.

These free events have been marketed to the homeschooling community within Indiana to promote recognition of Colearn, to build partnerships with local vendors, and to provide quality educational opportunities for students and parents.

2. Describe what you have done to assess and build parent and community demand for your school(s) and how you will engage

parents and community members from the time that the school(s) is(are) approved through opening.

Our Director of Growth and Expansion has been communicating and building support for the Colearn model with various homeschool parents and parent groups within the target counties in Indiana, while also assessing community demand for the Colearn model during the various outreach programs referenced in Question 1 of this section. While Colearn Academy Indiana will be an option for any K-12 student in Indiana, our focus has been on underserved rural areas with a smaller emphasis on more densely populated metro-regions. CAI will target its marketing efforts toward students and families that are currently homeschooled, likely residing in a "Schooling Desert" as identified by Edchoice, enrolled in existing virtual and online education programs, as well as those families that have indicated their desire to find an alternate avenue for a well rounded education. We serve all students who seek a more relevant, meaningful, personalized, and engaging education.

CAI will directly market to all of Indiana to ensure students in rural areas and throughout Indiana have access as well, which is the benefit of online learning. For families who live in rural regions, we will leverage existing infrastructure (both technological and social) to bring the Colearn experience to them. We will work to ensure that students have reliable, broadband internet access, providing WiFi or hotspots as needed. We will seek to provide culturally-relevant internship and field trip opportunities.

Although not our main focus, CAI will target regions that are more densely populated for two reasons: (a) Families can be supported in developing cooperative efforts to produce and/or attend shared learning and support experiences, such as meet-ups and group field trips, if they are within easy physical proximity to each other, and (b) the challenges of securing internships in local businesses, hospitals and other organizations are easier to mitigate, including transportation, in more densely populated cities

Accessibility is an incredibly important goal, as one thing to notice from the comparison schools is the low levels of minority enrollment. It's not truly an educational choice if students are not able to access our new school.

3. Describe how you will engage parents in the life of the school(s) (in addition to any proposed governance roles described in Section III below). Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school(s) will seek from, offer to, or require of parents.

Colearn Academy Indiana serves all students wanting to learn in a context that is personally relevant, connected to their interests, and embedded in their communities and in the real-world. Open to students living anywhere in Indiana, CAI is a free, online public charter school option built upon an evidence-based framework where students thrive. In addition, CAI provides opportunities for parents to support each other in shared learning experiences and project design.

"I always have to remind people that the biggest ingredient in school performance is the teacher. That's the biggest ingredient within a school. But the single biggest ingredient is the parent" (Barack Obama at Fox Senior High School in Missouri. April 29, 2009).

CAI's target population is "curious, engaged families." These families have expectations and ambitions which can not fully be served by local district schools, current charter schools, or even current online schools. These families may have considered or attempted to homeschool and/or "unschool," and may be doing so currently. They desire a more rigorous, real-world, and relevant learning opportunity than what is available to them in the current crop of Indiana online charter schools, and therefore Colearn Academy Indiana seeks to improve upon the outdated, online instructional model that has received widespread criticism of poor learning outcomes.

Most importantly, CAI fosters deep integration among students, its parents/guardians, and the curriculum. CAI will break from the traditional "put your child in front of a computer and hope he/she learns" approach to online education, and will instead create a new tradition of supporting parents as the "Program Mentor." CAI sees this as a new, as-of-yet-unimplemented educational model. CAI makes parent involvement in online instruction the new norm by offering training, resources, and funding to parents. CAI allows parents wide latitude to help select supplemental curriculum for their children. Thus, parents have heightened levels of "buy-in" to the educational process, while students legitimately benefit from a "custom-made" curriculum co-created by someone who loves them, knows them, and has a genuine interest in their success. Current online instruction methodologies — no matter how well intentioned — cannot offer this level of differentiated instruction because the instruction is divorced from physical interactions.

CAI recognizes that not all parents will be able to act as Program Mentors; however, it is still the school's goal to keep parents engaged in student learning and success. All parents are invited and welcome to attend our weekly parent workshops. These workshops provide parents the opportunity to connect with other families and receive high quality professional development from experts in the field of education. The Colearn portal also allows for opportunities for families to connect through a family directory, finding other Colearn families within their communities.

Our Education Specialist/Homeroom Teacher staff role will engage at least monthly with the Program Mentor, as well as take meetings upon request. In cases where the Program Mentor is not the parent, the parent will also be invited to attend these monthly Parent-Teacher Conferences. Parents will also be able to request 1:1 time with the Homeroom Teacher. During these monthly check-ins, the Homeroom Teacher will give an overview of how they observe progress, address any changing situations or evolving needs, and make recommendations on how to proceed with the learners so they can best achieve.

Several scholars have analyzed the homeschooling community and see a division between "idealogues" and "pedagogues," or "believers" and "inclusives." Idealogues and believers are sometimes homeschooling to protect their child from other belief systems, whereas pedagogues maintain they can better serve learning and personal development outside of formal school settings. Inclusives are trying to expose their children to many identities and belief systems. Inclusive families with pedagogue parents — parents who have informed and unique visions of their children's education and learning — want something else altogether, a new approach to education that is increasingly being called colearning.

Colearn Academy Indiana provides a set of services that makes learning outside of the classroom radically easier and less stressful for engaged parents and curious kids of all socioeconomic backgrounds. It recreates some of the value-propositions that families get from quality "brick-and-mortar" schools and makes them available outside of school — things like social interactions, multiple adult support structures, diverse learning opportunities, and direct access to curriculum resources. Families enrolled in CAI do not want to be molded to fit into the confines of traditional schools; they want a radically personalized option that will flex to meet the needs, interests, and passions of their children.

While Colearn Academy Indiana will serve any family, we specifically take on the task of leveling the playing field and narrowing the achievement gap by seeking out underserved populations in all enrollment efforts. CAI strives to break down key elements of structural racism embedded in the current academic systems in US schools. Based on the 2020 US Census, Indiana's statewide population was 6,785,528 people. White (non-Hispanic) made up 75.5%, black as 9.3%, and Hispanic or Latino were 8.2% of the population, Asian represented 3.1%, Native American 1.6%, and Pacific Islander were 0.2%.

While most charter schools are set up to specifically address the needs of a local community that may have specific demographic, economic, or racial characteristics, the needs CAI addresses transcend geographic boundaries and ethnic communities. Colearning families typically do not seek out instruction at a local district school; it is far more common to apply to an online charter school instead.

4. Discuss the community resources that will be available to students and parents. Describe any partnerships the school(s) will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning opportunities.

Colearn Academy Indiana will partner with various community organizations and businesses. CAI already has associations with community partners in various counties that will be available as resources for families enrolled. The list of current resources can be accessed in Attachment 8. Additionally, CAI will continue to update the resource list and partner with community organizations, businesses, and other educational institutions before the first day of school. Based on the CAI model, there will be a list of partners for enriching activities that parents can use funds to enroll their child in throughout their educational journey. CAI will also partner with businesses to offer internships for students to gain real-world knowledge and experience as they develop their post-secondary plans. Internships will be in-kind donations of time from the businesses with no fiscal requirements. CAI will join various Chambers of Commerce within Indiana to build connections and identify businesses willing to offer internships to CAI students. Some Chambers may already have internship or job shadowing programs as part of their workforce development initiatives. These opportunities will

not be fee-based, however parents may choose other opportunities for their child that could be fee-based as we want to allow for parent and student choice. CAI will work diligently to develop additional partners and maintain lists of opportunities to educate parents on the variety of options within their communities or link students in rural areas to options that may be virtual to expand their options.

CAI envisions the school as a conduit and connector to community organizations. We are the conduit to foster the interests of students through learning, and then the connector to build partnerships between families and community-based organizations, such as internships or enrichment activities. For example, CAI has already begun meeting with Education One and their Partnerships and Collaboration team to begin planning resources for students, families, and teachers. The opportunities are endless with Education One and Trine University to provide a holistic and innovative education model for families and teachers. These range from grants for teachers to professional development needs, Trine alumni serving through various projects based on the needs of our student population, to field trips, access to the Career Services Department for students and families, as well as dual enrollment. While some of these opportunities may have nominal fees for families, many are free and in-kind.

Based on the model of Colearn Academy, many research-based clickable curricula and resources are available to families who would not otherwise have access if they were homeschooling on their own and not enrolled with a school. By offering these curriculum and resource options to families and Program Mentors, the education is enhanced and enriched for each student through the various education vendors and edtech businesses. Some of these clickable curricula and resources include the following:

- Lexia Core 5 (K-5 reading) and Lexia PowerUp (6+ Reading)
- Dreambox (K-8 math)
- Imagine Learning MyPath (K-12 math/ELA)
- iReady Math & Reading Personalized Instruction (K-8, 9-12 for remediation), iReady Assessment/Diagnostic (K-12), and iReady Dyslexia Screener (K-3)
- Edmentum (K-12 math/ELA)
- Duolingo
- Newsela
- Generation Genius (K-8 science)
- Studies Weekly (K-6 science, social studies, & SEL)
- Zearn (K-6 math, full curriculum)
- MiAcademy (K-8 full curriculum)

By subscribing to each of these vendors, more opportunities for differentiated education for each student that may not otherwise be possible for students and families to support a high quality education.

Colearn Academy has begun seeking out other community partners for enrichment for students. As evidenced in Attachment 8, Erika Vevang, owner of Premier Martial Arts - Noblesville, has entered into a Memorandum of Understanding with Colearn as a partner for students and families by providing martial arts instruction. Colearn Academy will continue to develop these partnerships with other businesses within Indiana to provide opportunities for students.

5. Include, as **Attachment 8**, existing evidence of support from intended community partners, such as letters of intent/commitment, memoranda of understanding, and/or contracts.

Educational Program Capacity

Meets Standard Expectation

- Evidence that school leadership and management teams have the collective qualifications to implement the school design successfully, including capacities in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement.
- Evidence that organizations, agencies, or consultants that are essential to successful implementation of the plan are committed to have an ongoing role with the school.
- Evidence of the leader's experience in/ability to design, launch, and lead a school that effectively serves the target population, as well as evidence that the proposed leader is well qualified to implement the specific educational program being proposed.
- Evidence of the Board and/or network's preparation and plan to recruit and retain a leader with the ability to lead a school that effectively

- Appropriate responsibilities and qualifications of the school's leadership/management team (beyond the school leader).
- Individuals who demonstrate the qualifications, capacities, and commitment to carry out the designated leadership roles to ensure the success of the proposed school.
- Sound timeline, criteria, and process for recruiting and hiring leadership team members *(if applicable)*.
- Sound plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up, as well as a viable plan for compensating this individual or team that is aligned with the budget.

1. Name the key members of the school's leadership team. Identify only individuals who will play a substantial and ongoing role in school development, governance and/or management, and will thus share responsibility for the school's educational success.

Colearn Academy Indiana's Education Services Provider and the initial Applicant Team will provide the school's key members to launch the program within Indiana. Specifically, those individuals are Mandi Bateman, Michael Staton, Kimberly Phillips, and Amber Robinson. Currently, they are working to develop connections and partnerships, as well as educating the community about the Colearn Academy Indiana model. Additionally, each key member is working to identify key stakeholders within the community to serve in the roles of governance and management. Ultimately, the Governing Board, in partnership with Colearn ESP, will be responsible for the school's educational success and learning outcomes. Founding Governing Board members Ben Kornell, Tim O'Connor, and Chris Crowder all have significant education management and administration experience.

2. Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:
   - School leadership, administration, and governance;
   - Curriculum, instruction, and assessment;
   - Performance management; and
   - Parent and community engagement.

Colearn Academy Indiana's Education Services Provider current leadership team has a successful history of implementing education programs through charter schools in other states, such as Arizona. The ESP will provide the school leadership, administration, and governance with a track record of effectiveness and implementation of CAI philosophies. This will ensure CAI is quickly up and running to make a positive impact on student outcomes. The ESP will also provide the curriculum, instruction, and assessment resources for CAI through licenses and professional development for effective implementation. The ESP can scale and provide the policies and procedures to ensure capacity and growth of CAI.

As a current Charter Holder in Arizona, former teacher, and partner at Learn Capital, Michael Staton has experience and a proven track record in school leadership and administration. He has formed the Co-Learn Club and Colearn ESP with high quality experience in school governance and performance management. As the COO of Co-Learn Club, Mandi Bateman brings extensive management and administration experience to the school. Amber Robinson has experience with curriculum, instruction, assessment, school leadership and governance due to all the past and current roles she has held in education over the last 15 years as a teacher, mentor teacher, department lead, curriculum lead and school executive director. Kim Phillips, the Director of Growth and Expansion has already begun parent and community engagement to build partnerships and connections within the homeschool and special needs communities. Kim excels at community outreach and project management and brings many years of homeschool and charter school experience to the Colearn team.

Based on these connections, the ESP has identified a need and demand for school options based on these stakeholder connections in the targeted communities. Leadership is in the process of identifying the right school leader who is local to Indiana to carry out CAI's unique school design and program.

3. Describe the group's ties to and/or knowledge of the target community(ies).

Colearn Academy Indiana has made connections with the homeschool and special needs communities. Through these ties, CAI has identified that there is a need for another school option within Indiana that can reach the entire state, including rural areas who may not have as many options, through a virtual school environment. CAI has learned that many homeschool communities are collaborating to support one another. However, they may not have access to many of the research-based programs that CAI can

offer to support student learning and measure student progress. By partnering with these communities, CAI can provide options for families. Parents still have the opportunity to select the curriculum they feel is most appropriate for their child in partnership with CAI and have access to a variety of supplemental resources and support to enrich their children's experience.

Colearn is working to establish relationships with a variety of educational vendors in the targeted counties. We have met with vendors in our targeted counties with a positive reception and willingness to partner with us, and we will begin to source additional vendors in tutoring, PE, art, and other educational establishments within our targeted counties upon approval of the charter. So far, connections have been made with the following businesses:
- Matt Hagen Golf in Marion County,
- PMR Martial Arts in Hamilton County
- School of Rock in Marion County
- NRG Dance Company in Marion County
- Dyslexia Institute of Indiana in Marion County
- Dance Legacy in Marion County
- Tina Mangoes Art in Hamilton County

As evidenced through letters of support of key organizations and community leaders in Attachment 8, Colearn Academy has built connections and ties to target communities, such as advocates and leaders within the homeschool, special needs, and business communities. Community leaders Amanda Owens and Connie Tiscareno have been advocating for Colearn within the homeschool community to bring awareness to families and students who would benefit from the Colearn model. Erika Vevang, owner of Premier Martial Arts in Noblesville, has signed an MOU with Colearn and supports the Colearn model for the homeschool families of Indiana. Based on the knowledge shared from these key stakeholders, there is a significant need for high quality schools to meet the unique needs of homeschool and the special needs community that is not currently being met through the school models available within Indiana.

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

Colearn Academy Indiana currently has been making connections and building relationships with a variety of community leaders and organizations in the preparation of the school. For example, community leader Amanda Owens has been advocating for Colearn within the homeschooling community and in the special education community as a business owner and network leader. She is an advocate for these populations within the Indiana community and sees CAI as a valuable and innovative option for families. Warner Family Farms has agreed to support the CAI model through enrichment experiences for students. Another community member, Connie Tiscareno, who was a homeschooler herself and now a grandmother with grandchildren who have various needs, is advocating for CAI as the model fits a need within the community that is not already being met.

As a charter school, we are also excited about the partnership with Education One as the authorizer. There are many invaluable supports and resources from Education One and Trine University that will enhance and further enrich the CAI model for students and families. We know that through the partnership, Education One and Trine University can make additional community connections and provide support to families and staff of CAI. By maximizing programs such as Trine Pals, field trips connected to pathway programs, dual enrollment, and the presence and support of Education One, there are many opportunities for innovation to support the community.

CAI has established relationships with vendor partnerships of educational businesses throughout Indiana. Some of CAI's partners are as follows:
- Pam Stumpf Music Studios will provide lessons in piano and handbells.
- School of Rock, a center providing instruction in guitar and other instruments.
- The Giving Gardens of Indiana, a center providing classes in agriculture, gardening, and nature-based classes.
- PMR Martial Arts, providing PE Enrichment and self defense classes.
- Matt Hagen Golf, providing individualized golf instruction.
- Tina Mangoes Art, providing in-person and virtual art instruction.
- NRG Dance Company, providing dance instruction in tap, ballet, and jazz.

- Dyslexia Institute of Indiana, a specialist in reading instruction.

These vendors will be available to our students to utilize through the Colearn Partner Portal, where students can choose a variety of educational and extracurricular activities to customize their education.

5. Provide, as **Attachment 9**, the resume for the proposed school leader. Below, provide and discuss specific evidence that the proposed school leader demonstrates the capacity to design, launch, and manage a high-performing charter school with the anticipated student population. If no candidate has been identified, provide as **Attachment 10** the job description or qualifications, and discuss the timeline, criteria, and recruiting and selection process for hiring the school leader.

Colearn Academy Indiana will be recruiting for the right school leader to carry out the mission of CAI's innovative model after the proposed Charter is approved. Attached is a job description for the school leader: Executive Director. Recruitment for this position will begin in October 2022. Based on the recruitment process, the right candidate for the Executive Director position would begin in their role by April 1, 2023. This will provide an opportunity for the Executive Director to complete onboarding and be involved in the recruitment of other key individuals within CAI, as well as instructional staff to build a team to carry out the mission and vision of CAI. The Executive Director will also be able to participate in enrollment and recruitment efforts of students and connect with community partners that are key to the success of CAI.

6. Describe the responsibilities and qualifications of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions and provide, as **Attachment 11**, the resumes for these individuals. If these positions are not yet filled, explain the timeline, criteria, and process for recruitment and hiring.

At Colearn Academy Indiana, the responsibilities for the school's management and leadership beyond that of the Executive Director will lay mainly with the management team of Colearn ESP. The relationship between the Executive Director and Colearn ESP is such that they will work very closely together to contribute to the success of the school. Colearn ESP will begin recruiting for the management roles such as, Director of Engagement, Director of Secondary, Director of Elementary, and the Director of Operations in October 2022. The Governing Board will also contribute their expertise when needed and help in the recruitment process.

As the process for recruitment progresses, Colearn ESP and CAI will utilize multiple media outlets and strategies in our search for the talent that will embrace the mission and vision of CAI. Recruiting will take place via job board postings, social media, personal referrals, and the partnerships we are forming with the community and various stakeholders.

While the organization is undergoing the transition from the for-profit Colearn Club, Inc. to the new not-for-profit Colearn ESP, the core applicant team will provide the necessary leadership. The team is made up of Michael Staton, Mandi Bateman, Kimberly Phillips, and Amber Robinson. With their successful experience in leading and managing in the education field, startup businesses, and similar organizations, they possess the necessary skills to provide the needed leadership and support for the Executive Director, as evidenced in their resumes in Attachment 11. They will also provide the added knowledge and resources for the operations and compliance required for a charter school. Ultimately, their proven success and experience will provide added value and support not only for the Executive Director of CAI, but will also positively impact the communities within Indiana.

7. Explain who will work on a full-time or nearly full-time basis following assignment of a location to lead development of the school and the plan to compensate these individuals

Colearn Academy Indiana's Education Services Provider will work full-time and serve as the lead development of the school during the startup phase, as well as provide the compensation for the assigned employees as outlined in the Attachment 19 Staffing Chart. Once the Executive Director of CAI is hired, they will work in cooperation with Colearn ESP personnel to continue the school development. The Executive Director will be compensated by CAI as shown in the Budget and Staffing Worksheet.

GOVERNANCE

Legal Status and Governing Documents

> **Meets Standard Expectation**
> ● Proposed school's legal status and structure are in compliance with state law.
> ● Governing bylaws, policies, and procedures are comprehensive and sound.

1. Describe the proposed school's legal status, including non-profit status and federal tax-exempt status. Submit Articles of Incorporation, proof of non-profit status and tax exempt status (or copies of your filings for the preceding items), and any governing documents already adopted, such as board policies, in **Attachment 12**. Submit, as **Attachment 13**, the completed and signed Statement of Assurances.

> Colearn Academy Indiana is working with legal counsel and recently established an Indiana non-profit entity. The next step in the process will be to submit the application to the Internal Revenue Service for 501(c)(3) designation. Legal counsel is currently engaged and has completed the 501(c)(3) application, it has been submitted and is awaiting IRS approval.

Organization Charts

> **Meets Standard Expectation**
> ● The organization charts should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory boards or parent/teacher councils), and any external organizations that will play a role in managing the school.
> ● The organization charts should also document clear lines of authority and reporting within the school(s).

1. Submit, as **Attachment 14**, organization charts that show the school governance, network management, leadership, and staffing structure in: a) Year 1; and b) at full build-out.

Governing Board

> **Meets Standard Expectation**
> ● Effective governance structure for network and school governance, whether each school will have an independent board or there will be one or more boards overseeing multiple schools. Well-planned board(s) size, powers, duties, and current and desired composition that will foster school(s)/network success.
> ● Clear division of duties if there will be multiple boards serving multiple schools.
> ● Clear, appropriate plans for the board(s) to evaluate the success of the school(s) and school leader(s).
> ● Proposed board members who demonstrate: (a) will, capacity, and commitment to govern the school(s)/network effectively; and (b) shared vision, purposes, and expectations for the school(s)/network
> ● Evidence that the proposed governing board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school including educational, financial, legal, business, and community engagement expertise.
> ● Sound, timely plan for creating or transitioning to the school governing board *(if applicable)*.
> ● Sound plan for transforming existing board to assume its new duties or forming a new board *(if applicant is an existing not-for-profit organization other than a charter school governing board)*.
> ● Other effective governance procedures, including planned frequency of meetings and standing committees.
> ● Appropriate proposed Code of Ethics and Conflict of Interest policy/procedures that will minimize real or perceived conflicts.
> ● Sound plan and timeline for board recruitment, expansion, orientation of new members, and ongoing training for members. Plan should include a thoughtful identification of desired experience and capacities.
> ● If there will be a network-level board, plan for clear identification and plan for addressing board development needs relative to growth.

1. Describe the governance structure and size of the proposed board and the plan for satisfying all applicable statutory and authorizer requirements for the composition of school governing boards. Explain how the governance structure and

compositions will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders within the proposed community(ies) being served, including parents.

The Governing Board for Colearn Academy Indiana will maintain an odd number of members — no less than three and no more than seven. The Governing Board will be made up of a diverse array of people with backgrounds in areas that will support the school's mission to inspire and empower all students to be responsible, resilient, and personally successful in a rapidly changing world.

Using our eventual student demographics as our guide, we will construct our Governing Board to reflect the ethnic, gender, racial, and socio-economic diversity of our student body. At this early stage, we are prioritizing people with backgrounds in school operations, pedagogical innovation, public engagement, service learning and internships, finance, and employability.

The goal is that initially the Governing Board will be composed of five members. We intend for these five members to include, but not be limited to, a local educational leader such as a Principal or Director, a member with financial or business background, a parent, a member with a Charter School operations background, and a member at large.

The School Governing Board supports a strategic governance philosophy wherein the Board will participate in creating and approving broad policies based on CAI's obligations, mission, vision, and goals. The Board strives to have each member bring value to the school through active participation, to sustain cooperation between school faculty and the Board, and to seek input from various stakeholders including school leadership, staff, students, parents, and other community members we have partnered with. The Governing Board members must perform their duties to the highest professional and ethical standards. Members will be expected to participate and bring unique value, perspective, and contribution to the Governing Board.

The School Governing Board will help institute school policies that promote CAI's priorities and advance the school's mission and vision. The Board will regularly interact with school leadership, staff, parents and diverse stakeholders and will maintain high professional and ethical standards.

The School Governing Board of Colearn Academy Indiana will participate in overseeing all academic and operational activities and work closely with the Colearn ESP and school staff to ensure the school is running effectively, efficiently, compliantly, and up to state standards. The Governing Board will have the responsibility of hiring the key positions of Executive Director, Registrar, Experiential Lead and Administrative Assistant. They will work closely with Colearn ESP to recruit the best candidates for these positions. The teachers and other support staff will be employees of Colearn ESP. The Governing Board will work closely with Colearn ESP during the hiring process to ensure that Highly Qualified and mission-sensitive personnel are employed. As part of the academic and operational oversight, the Governing Board will evaluate the school's academic and operational performance annually. The performance review will be based on the school's academic achievements, financial reports and a review of compliance indicators. The school evaluation tool will be developed by Fall of 2023.The Board will be responsible for evaluating the performance of the Executive Director and will utilize the Leadership Evaluation Tool found in Attachment 21. If the performance of the Executive Director is found to be lacking, problematic, or they are in direct violation of school policy, then the Governing Board will meet to vote on termination. The actual termination of employees will be handled by a contracted HR service and reported to the Governing Board when complete..

The Governing Board will follow any guidelines set forth by the Authorizers, including Academic Oversight, Financial Oversight, Regulatory Oversight, Leader Support and Evaluation, Composition and Structure, Meetings, Goals and Accountability.

The Governing Board will participate in overseeing the creation and publishing of operating policies, plans, and budgets that give the Governing Board full confidence that Colearn Academy Indiana will effectively and successfully serve the school community.

The Governing Board will ensure that Colearn Academy Indiana adheres to its mission and vision and transparently maintains accountability in line with regulations and community expectations.

In conjunction with Colearn ESP the Governing Board will create an on-boarding and professional development program for Board Members. Board Members will have a modest budget to attend professional development events and events where their presence could create value for Colearn Academy Indiana.

Under the direction of the Governing Board, Colearn ESP shall be responsible for providing direct educational and school management services for the Academy. The Governing Board will retain the ultimate responsibility to ensure that the school educational services to the community are compliant with all applicable state statutes and the Authorizer regulations.

The School Governing Board may have at least one committee, the Operations Committee, which will provide guidance and oversight to effective organizational leadership and excellent organizational practices, including finance and budgets. In addition, the School Governing Board may create and absolve special committees or working groups with a majority vote, and may appoint members or non-members to special committees or working groups with a majority vote, as they deem relevant. Any officer or employee of Colearn Academy Indiana may be removed and/or terminated with or without cause by a majority vote of the directors.

2. **Replication Schools:** If there will be both a network-level board and boards at each school, describe the organizational relationship between the boards, the legal status of each board, and the scope of authority of each. If each school will have an independent governing board but no network-level board, explain how the network will be governed and how decisions that affect the network as a whole will be made.

Not Applicable.

3. **Replication Schools:** Explain how the interests of individual schools will be balanced with network interests and how key stakeholders will be represented.

Not Applicable.

4. As **Attachment 15**, list the members of the school's proposed governing board, network and/or independent, with the following information:
   - Summary of members' interests in and qualifications for serving on the school's board; and
   - Full resumes (including contact information).

5. As **Attachment 16,** provide a completed and signed Board Member Notice of Disclosure for each proposed board member.

6. If the current applicant team does not include an initial governing board, explain how and when the transition to the formal governing board will take place.

Not Applicable.

7. If this application is being submitted by an existing non-profit organization respond to the following:
   - Will the existing non-profit board govern the new school(s), or has(have) the school(s) formed a new non-profit corporation governed by a separate board?

Not Applicable.

   - If the non-profit's current board will govern the school(s), what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.

Not Applicable.

   - If a new board has been formed, describe what, if anything, its ongoing relationship to the existing non-profit board will be.

We are actively working with legal counsel to establish our network governance, management structure, and leadership team. We are working closely with Heather Harris, a Partner at Barnes & Thornburg LLP in Indianapolis. Colearn Club, Inc. anticipates

relocating its charter support/ESP services into a new IRS designated 501(c)(3) entity ("ColearnESP"). The School has been organized as an Indiana nonprofit entity and is seeking federal 501(c)(3) designation. The School Board will have a contractual arrangement with Colearn ESP for Education Management Services. ColearnESP will recruit and retain a school leader to be recommended to the Board for final approval. The school's Executive Director, Registrar, and Experiential Lead(s) will be employees of the charter. Colearn ESP will employ and manage all other staff.

8. Explain the procedure by which board members have been and will be selected. Discuss how often the board will meet and the plans for any committee structure.

As we recruit members for the Colearn Academy Indiana Governing Board, we will search for members with a variety of backgrounds to ensure that we have a well-rounded team of expertise. We actively engage members of the community with experience in law, politics, finance, business, teaching, and agriculture. We look for professionals who exhibit the following attributes: commitment to educational innovation, expertise in a particular field, time and energy to devote to their board commitments, and a well-rounded background. Our ideal board will consist of 5-7 members. The timeline process for board member recruitment is as follows:

- Potential Board members are identified.
- Our Director of Growth and Expansion schedules and conducts the initial interview.
- Potential board members who are still interested after the round one interview will be asked to formally apply. After applying, and passing the necessary background checks, the second interview is held with the team and/or current Governing Board members.
- Upon approval from the applicant team the potential member will join the Board. If the Governing Board is already formed, the potential member will go before the Governing Board at the next scheduled meeting for a vote of approval.

The Governing Board at Colearn Academy Indiana will schedule regular School Board meetings monthly. There are no current plans for committees, other than the usual working committees found on most school Governing Boards.

9. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts. Provide, as **Attachment 17**, the board's proposed Code of Ethics and Conflict of Interest policy.

Any director, principal officer, member of a committee with governing board delegated powers, or executive level administrative employee with governing board delegated powers who has a direct or indirect financial interest, as defined below, is an interested person.

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,

b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or

c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

10. Describe plans for increasing the capacity of the governing board. The plan for training and development should include:
    - Timetable;
    - Specific topics to be addressed; and
    - Requirements for participation.
    If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.

The School Governing Board will initially be selected by a committee consisting of the applicant team in conjunction with Colearn ESP personnel who are currently responsible for recruiting and interviewing new board members.

The Director of Growth and Expansion will first identify and recruit potential board members, and then will share the vision and purpose of Colearn Academy Indiana with them. If the potential school board member is willing, they will proceed to an interview with the rest of the governance committee, which will undertake a rigorous review of their qualifications and experiences to ensure that the individuals can support the operational aspects of Colearn Academy Indiana.

This includes, but is not limited to, checking personal references and administering questions to gauge the depth of the candidate's understanding of the various operational aspects of a charter school. The governance committee will support the selection of qualified personnel to the School Governing Board for a period of two years. Past the initial two years of operations, the School Governing Board will be autonomous in the selection, management, and dismissal of Board Members.

Potential School Governing Board members will undergo a rigorous review of their qualifications and experiences to ensure that the individuals can support the operational aspects of Colearn Academy Indiana. This includes, but is not limited to, checking personal references, administering questions to gauge the depth of the candidates understanding of the various operational aspects of a charter school, parent and student meetings, observation of staff and teachers as they undergo their duties, and attending at least one board meeting before they are appointed.

School Governing Board members will serve three year terms. After an initial period, Members should be selected in stages, so that in any one year approximately one third of the School Revised Governing Board will be serving their first year, their second year, and their third year, respectively. The School Governing Board should avoid any year with more than half of Board Members serving their first year.

Board members will be required to participate in training on financial oversight, accountability and fiduciary responsibilities of the Governing Board, on Open Meeting Law, and on the powers, functions and duties of Board Members. Trainings will occur within the first year of their term.

At the end of each school year the School Governing Board will distribute a matrix of perspectives, experience, expertise, and skills that are needed for improved Board performance and responsiveness to the enrolled families and the communities in which they live. As the School Governing Board can anticipate vacancies for members, or when one should arise, the Governing Board will work closely with Colearn ESP and the key officers of Colearn Academy Indiana, to generate a list of nominations and form a Selection Committee. The Selection Committee will be responsible for considering, interviewing, evaluating, and proposing a nomination to the Governing Board, and may request resources to perform their search process. New members will be approved by a majority vote of the serving School Governing Board members.

Advisory Bodies

Meets Standard Expectation
● Clear roles, duties, and composition of any advisory bodies/councils, and effective relationship to the school governing board and leadership.

1. Describe any advisory bodies or councils to be formed, including the roles and duties of that body.

Colearn Academy Indiana does not plan to form any advisory bodies or councils at this time.

2. Describe the planned composition of the advisory body; the strategy for achieving that composition; the role of parents, students, and teachers (if applicable); and the reporting structure as it relates to the school's governing body and leadership.

Not Applicable.

Grievance Process

> **Meets Standard Expectation**
> ● Fair, accessible grievance process for parents and students.

1. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

Colearn Academy Indiana will adopt policies and procedures specifically to address harassment (Title IX), discrimination and bullying concerns in its school environment. The specific grievance procedures for these issues will be found in the school handbook. In the event a complaint of this nature is made to a staff member, the staff member must follow the guidelines and procedures set forth in these policies.

Parents, guardians and students will occasionally disagree with decisions that are made in regards to discipline, grades, school operations or procedures. Usually, these concerns about student progress, policy concerns, and policies and procedures can be addressed informally by a phone call or a conference with a staff member. If the issue or concern is about a staff member, the initial contact should be with the Executive Director.

In the event that a concern has not been resolved after a conference with the staff member, we request that an email be sent to the Executive Director and a conference call will be arranged to address the family's concerns. If necessary, the next step would be contacting the school Governing Board and requesting a review of their concerns.

School Management Contracts

> **Meets Standard Expectation**
> ● Compensation is clearly articulated and includes a detailed description of the management fee, as well as all pass-through expenses.
> ● Clear process for choosing the identified ESP/CMO
> ● Effective relationship between the school governing board and the ESP/CMO to support the mission, vision, and educational programming of the proposed school.
> ● Includes a term sheet and draft of proposed contract detailing roles and responsibilities of the school governing board, the school staff, and the service provider; scope of services and resources to be provided by the service provider; performance evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract.

If the applicant does not intend to contract with an ESP or CMO, mark "Not Applicable" and move to the next section.

1. Describe the ESP/CMO founding year and current geographic footprint.

We are actively working with legal counsel to establish our network governance, management structure, and leadership team. We are working closely with Heather Harris, a Partner at Barnes & Thornburg LLP in Indianapolis. Colearn Club, Inc. is in the process of aligning its charter support/ESP services into a new IRS designated 501(c)(3) entity ("Colearn ESP"). Since this is a brand new entity, 2022 is the founding year and the current geographic footprint will be in Indiana, supporting Colearn Academy Indiana in its first year.

Colearn Club, Inc. was incorporated in 2018, but began as a project in 2016 out of the Learning, Design and Technology Program at Stanford University — a program jointly managed by the Graduate School of Education and the Graduate School of Design. LDT students worked with Michael Staton, then a General Partner at Learn Capital, and Vinit Sukhija, then the Manager of the Social Entrepreneurship & Innovation Initiative for Teach for America, on concepts for new school models that might show promise to be both high performing and pedagogically innovative using technology. Stanford LDT students, professors, Staton and Sukhija also spent time with the Bay Area Gifted Homeschoolers (BAGHs) who were growing in numbers and pursuing innovative models of learning, whose learners were unique academically advanced, well-rounded, mature, civically minded, and coincidentally and surprisingly auditing courses at the LDT program in their teens. BAGHs parents and students also contributed ideas across several "design sessions" which culminated in a day-long "solution share" at the Stanford Campus.

(Learn Capital is a widely known global supporter of Educational Technology innovators of over 160 lighthouse organizations, including Edmodo, ClassDojo, Outschool, Nerdy [Varsity Tutors], Brilliant, Photomath, DIY, Bridge International Schools, Higher Ground Education, eSpark, BloomBoard, EdSurge, BrightBytes, MysteryScience, NoRedInk, Desmos, LearnZillion, MasteryConnect, Udemy, Coursera, Podium Education, Teachable, Minerva University, Singularity University, Osmosis, Novakid, and WonderSchool.)

It was clear the world would need new models of virtual and hybrid schools on the onset of the pandemic in March 2020 — and that those new virtual and hybrid schools would need innovative, quality, transparent, ethical ESP organizations. Thus, Colearn Club, Inc. began the work building a parent-centered platform for highly flexible learning that nudges strong pedagogy, and initiated a virtual charter — Colearn Academy Arizona.

2. Explain how and why the ESP/CMO was selected and the due diligence conducted (including a list of other entities assessed during the diligence process, if any).

As a new Education Service Provider, Colearn ESP is the selected ESP for Colearn Academy Indiana. The Applicant Team currently holds leadership roles at Colearn Club, Inc., the "parent entity" of Colearn ESP. The background and history of Colearn Club, Inc. is further described and the relationship between all the entities is described elsewhere in this application. Colearn ESP will therefore have the intellectual knowledge, key personnel, administrative support and experience with virtual schools that Colearn Academy Indiana needs to fully execute their unique educational model in Indiana.

It is the opinion of the applicants that the world needs a high quality, high-performing, transparent and high-integrity innovator in the Virtual Charter ESP space. Current research yields depressing findings on the most popular, most common, most widely used ESP providers. Our team of high quality, high performing individuals have come together to change the way virtual education is delivered, to be innovative and create an individualized education experience for each student who enrolls.

3. Provide, as **Attachment 18,** the following:
   ● Term sheet setting forth a proposed duration of the contract that aligns with the charter term; roles and responsibilities of the school governing board, the school staff, and the service provider; scope of services and resources to be provided by the service provider; performance evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider (both management fees and all pass-through expenses, such as for curriculum licensing or technology); financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract;
   ● Draft of the proposed management contract detailing all the above limits; and
   ● Evidence that the service provider is authorized to do business in Indiana.

4. Summarize the relationship between the school governing board and the ESP/CMO, specifying how the governing board will monitor and evaluate the performance of the provider, the internal controls that will guide the relationship, and how the governing board will ensure fulfillment of performance expectations.

The school governing board and ESP will have an agreement that addresses monitoring, evaluation, and performance indications based on Education One's accountability plan. The draft agreement and term sheet can be found in Attachment 18.

5. Disclose and explain any existing or potential conflicts of interest between the school governing board and proposed provider or any affiliated business entities.

The newly formed school Governing Board has been formed at arms length with Colearn ESP with no existing conflicts of interest or affiliated business entities.

STAFFING

Staff Structure

<table>
<tr><td align="center">**Meets Standard Expectation**</td></tr>
<tr><td>● Sensible five-year network staffing that will support high-quality replication at the scale proposed, while continuing success at existing schools *(if applicable)*.
● Sensible staffing rollout plan for the school model(s) aligned with the educational program and conducive to school success.</td></tr>
</table>

1. Provide, as **Attachment 19**, a complete staffing chart for the school(s). The staffing chart(s) and accompanying notes or roster(s) should identify the following:
   - Year 1 positions, as well as positions to be added in future years;
   - Administrative, instructional, and non-instructional personnel;
   - The number of classroom teachers, paraprofessionals, and specialty teachers;
   - Teacher-student ratio, as well as the ratio of total adults to students for the school; and
   - Operational and support staff.

2. Explain how the relationship between the school's network leadership (if applicable), senior administrative team, and the rest of the staff will be managed.

Colearn Academy Indiana will model strong leadership skills and work diligently to have good communication between the Governing Board, administrative team, contracted Education Specialists, and Program Mentors. Our goal is to provide a successful education experience for our families and employees. Our unique educational model, utilizing Program Mentors, lends to the total adults-to-student ratio of 1:2.25.

Contracting with Colearn ESP to provide flexible support throughout the school year, including leadership development, technical support, conflict resolution, back office support, as well as providing instructional staff. This frees up the administrative team to concentrate on the day-to-day school operations, student and staff support and maintain good communication with families. The Governing Board has oversight of the Executive Director and will be charged with performing an annual performance evaluation and follow up. Respectively, the Executive Director manages the school staff, both support and instructional, and shall report any successes to be celebrated or issues to be discussed to the Governing Board.

Staff Plans, Hiring, Management, and Evaluation

Meets Standard Expectation
- Compensation packages, systems, and strategy that are likely to attract and retain strong staff.
- Recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong staff that meet ESEA requirements for being "Highly Qualified" and are well suited to the school
- Plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff.
- Sensible allocation of school vs. network responsibilities for staffing.
- Leadership and teacher evaluation tools that are likely to be effective.
- Effective planning for unsatisfactory leadership/teacher performance and turnover.

1. Explain the relationship that will exist between the school(s) and its employees, including whether the employees will be at-will and whether the school(s) will use employment contracts. If the school(s) will use contracts, explain the nature and purpose of the contracts. Provide, as **Attachment 20**, a personnel policy or an employee manual, if developed.

Colearn Academy Indiana is an at-will employer, therefore, either the school or the employee may terminate the contractual agreement at any time with or without cause. CAI will provide a Letter of Intent for employment offers and, when accepted, will provide a full at-will contract. Program Mentors are contracted (1099) and receive no additional benefits or pay outside of their contact with CAI. Our employee handbook is currently in development, and we have retained attorneys to vet both our handbook and contracts to confirm they are current and applicable to state employment law. The latest version of our handbook is provided as Attachment 20. Contracted Education Specialists (teachers) and other contracted support employees will be employed by Colearn ESP as part of the agreement with the Governing Board. Contracted employees will be subject to the policies included in the Colearn Academy Indiana Employee Handbook.

2. Outline the proposed school's salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school's strategy for retaining high-performing teachers.

Colearn Academy Indiana will utilize the following salary schedule for the administrative employees they hire:
- Executive Director: Minimum first year salary of $90,000

- Experiential Lead: Minimum first year salary of $64,000
- Registrar: Minimum first year salary of $40,000
- Administrative Assistant: Minimum first year salary of $65,000

CAI is confident that these salaries are sufficient to recruit and retain top notch talent. Additionally, CAI has budgeted for an above average yearly salary increase of 5 percent. We currently have no additional salary increases or bonuses moving planned. These may be considered in the future, dependent on school growth and student achievement.

Colearn Academy Indiana instructional staff (Education Specialists) will be contracted employees via Colearn ESP. Colearn ESP offers competitive salaries for all school staff they employ. The starting salary for Education Specialists is $60,000 in Year 1, as calculated in our budget worksheet. This competitive starting salary is higher than the statewide average and will be a useful tool in our recruiting efforts. In addition to a higher-than-average salary, Colearn ESP has a robust employee benefit program that is summarized below which will also be available to Colearn Academy Indiana employees:
- Unlimited paid time off (with high expectations and parameters to prevent abuse)
- 401k: Safe Harbor Plan by Fidelity, administered by Slavic: Colearn's 401k plan matches 100% of employee contributions up to 6 percent per payroll.
- Colearn Club Inc's QSEHRA benefit (Maximum HRA contribution)
    - The allowance for Single marital status is $454.16 per month.
    - The allowance for Single marital status with dependents is $920.83 per month.
    - The allowance for Married marital status is $920.83 per month.
    - The allowance for Married marital status with Dependents is $920.83 per month.
- Access to the Human Resources Services Center to discuss any employment concerns.
- Training opportunities through the eLearning center: Employee can take advantage of over 6,000 online training courses at no cost.
- Numerous employee discount programs are available through PEO. These include discounts on travel, retail, entertainment and more.
- Supplemental Plans: Chubb Disability Income, Lever Term Life, Accident and High Deductible Buffer.

While excellent benefits and compensation are helpful in staff retention, there are other items that are important for retaining high quality staff. CAI, in partnership with Colearn ESP, will strive to have an excellent school culture, professional development, leadership development and opportunities for growth. Current employees of Colearn Academy Arizona, when surveyed, spoke of the Colearn community and culture in only positive terms, as is evident in the following testimonials:

"I enjoy working at Colearn because 'FAMILY' is its core value. You can see it in every offering of Colearn's culture and as an employee I have the flexibility to work from home with a schedule that is supportive to my own family, it's an absolute dream come true!"

"I imagined a new model of education where parents had a voice and a choice, inspiring educators rallied, and students took charge of their learning. Turns out, it's already developing at CoLearn Academy, and I want to be a part of it!"

"I love working for a company that is at the forefront of the necessary change in education this country desperately needs. Colearn Academy puts the parents in the driver's seat of their children's education. Parents are given the ability to work with our Certified Teachers to design an educational path that is tailored to each student's needs, interests and level."

3. Describe your strategy, plans, and timeline for recruiting and hiring the teaching staff, including the school's plan for hiring "Highly Qualified" staff in accordance with the Elementary and Secondary Education Act (ESEA). Explain other key selection criteria and any special considerations relevant to your school(s) design.

Recruitment of our instructional staff will begin January 2023 as a joint project between the Governing Board and Colean ESP, once the Executive Director is on Board they will also be involved in recruitment, if necessary. We will be posting open positions on the various job platforms, such as the IDOE job board, Indeed.com, LinkedIn, Teacher to teacher, etc. in order to attract high quality candidates. CAI will concentrate our efforts to employ certified and Highly Qualified teaching staff, who have experience in working

with virtual learning platforms. Candidates will participate in a multi-stage interview process to identify the best possible fit for our culture and environment.

Potential candidates must go through a three-step process before being offered employment:

1. The Executive Director meets with the candidate to describe the unique Colearn Academy model, as well as discusses their qualifications and interest in working with the Colearn team. If the Executive Director perceives that the candidate may be a good fit with Colearn Academy, the candidate will then advance to Step 2.
2. Step 2 of the hiring process is a second interview with a 3- or 4-member panel, which may include executive level Colearn ESP personnel the school Executive Director. They interview the potential employee, addressing specific questions to discover what the candidate will bring to the school. The panel will seek to discover the candidates ability to mesh with the Colearn culture and their core beliefs around student engagement. The candidate may be asked to bring a portfolio of previous teaching experience to present to the panel as well.
3. Once the best candidates are chosen to move forward in our process, a comprehensive background check, reference checks, and any state certification checks will be completed by the HR department.

All instructional staff will be hired by July 1, 2023 in order to be available for staff training, as well as any planned professional development and family and community engagement before the first day of school.

4. Outline the school's procedures for hiring and dismissing school personnel, including conducting criminal background checks.

Human Resources at Colearn Academy Indiana is provided by Colearn ESP. The HR team at Colearn ESP will work with the Governing Board and Executive Director during the staff hiring process. Potential staff members must accept the terms outlined in the Letter of Intent, and sign their employment offer and agree to a criminal background check pursuant to IC§ 20-26-5-10 and IC§ 20-26-2-1.5. All offers and contracts will be void if an employee's background check is returned as unfavorable. During the onboarding process, new staff will have an opportunity to review their benefit options and review the employee handbook.

The CAI Governing Board shall be responsible for employing staff for the positions of Executive Director, Experiential Lead, and Register. Colearn ESP shall employ all necessary teaching staff and other staff necessary to operate the Academy pursuant to the approved Budget for the Academy. All staff that are employed and work at CAI (regardless of whether such staff member is employed by the Governing Board or Colearn ESP) will be managed by Colearn ESP and shall be accountable to Colearn ESP for the day-to-day performance of the employee's job requirements. The CAI governing Board maintains the ultimate responsibility for staff employed by the Governing Board directly. On an annual basis, during the annual budgeting process, Colearn ESP shall recommend to the Governing Board staffing levels and compensation levels, which will be approved by the Board. Colearn ESP shall have the authority to select, evaluate, assign, discipline, and transfer Colearn ESP staff consistent with the contractual agreement between Colean ESP and CAI. The combined staff of Colearn ESP and the Board shall be referred to "Academy Employees" for purposes of this Agreement. Colearn ESP shall provide oversight of the Academy Employees and assist with tasks including, but not limited to, preparing job applications, posting the job descriptions, interviewing applicants, managing the criminal history background check process and compliance, ensuring proper licensure and certification, providing day-to-day management of the Academy. The Colearn ESP services noted in this Section shall supplement and shall not supplant the role and responsibilities of the Board to the Board's Employees (if applicable) and the job descriptions and responsibilities of such employees to the Board.

Colearn Academy and ColearnESP are at-will employers, and will make multiple attempts to prove cause prior to dismissing school personnel. Performance expectations and cause for termination will be stated in the employee handbook.

Employees that have a poor evaluation (utilizing the Leadership Evaluation and Teacher Evaluation tools found in the attachments), poor attendance, or exhibit any other behavior that may affect the school performance or reputation may be terminated following the schools procedure:

● A meeting with the employee and their supervisor to address the issues and set measurable goals for change within two weeks.

- If no change within two weeks' time, the employee may be put on a written improvement plan with a check back to evaluate improvement in 30 days (or longer if all agree that a different time frame is necessary).
- The employee will be terminated if no improvement is shown. The termination discussion will be held by the employee's direct supervisor and reported to the Governing Board.

The termination process will be handled as a contracted service with the HR department of Colearn ESP. All separations will be handled fairly and in compliance with applicable state and federal law.

5. Explain how the school leader(s) will be supported, developed, and evaluated each school year. Provide, in **Attachment 21**, any leadership evaluation tool(s) that you have developed already.

School Leadership development is vital to the success of Colearn Academy Indiana. CAI will partner with Colearn ESP as our Professional Development provider. Colearn ESP will provide training on school operations and compliance, administrative data analysis, budgeting, and training on support services for better understanding of Human Resources, Marketing, and school finance. Additionally, professional development will be provided concerning school communities and culture, diversity and time management. Having access to a variety of professional development will be critical to the success of our leaders and the school. The Colearn Academy Leadership evaluation tool will be a modified version of the IDOE Principal Effectiveness Tool, provided in Attachment 21, and will be used by the governing board to help facilitate leadership development and provide feedback for our leaders. The tool will be utilized on an annual basis, and coupled with observations and frequent check-ins, will help shape the professional development plan for our leaders.

6. Explain how teachers will be supported, developed, and evaluated each school year. Provide, in **Attachment 22**, any teacher evaluation tool(s) that already exist for the school(s).

Instructional staff at CAI will have opportunities for professional development throughout the school year, CAI will have multiple tools available for both professional development and evaluation. CAI will partner with Colearn ESP as our Professional Development provider and has budgeted for the implementation of other outsourced professional development opportunities as well.

The CAI evaluation tool will be a modified version of the Rise Teacher Evaluation Tool based on the Charlotte Danielson Model and found in Attachment 22, which fits the unique educational model at CAI. The Executive Director will also conduct virtual "walkthroughs" of online classes, meet weekly with instructional staff and Program mentors to assess areas of need and support. Possible professional development may include the following dependent on focused needs:
- School Culture Data-driven instruction
- Differentiation
- Virtual Platforms
- Time management

7. Explain how the school(s) intends to handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.

CAI will set clear expectations and work to develop a healthy climate and school culture that creates an atmosphere lending itself to staff retention. However, turnover is always possible at any school. Acknowledging the fact that turnover is inevitable, CAI will develop a succession plan and continue to develop leaders within current staff.

CAI will work with our ESP, Governing Board, and school leaders to annually evaluate the staff. Educators and school leaders will receive valuable feedback in real time. When a staff member is found to be performing at a level that is not satisfactory, an improvement plan will be implemented. Underperforming staff will be provided with training, professional development, coaching, and support. If at the end of the improvement plan term the unsatisfactory behavior or performance has not improved the process for termination will begin. If their behavior or performance has improved, but not to the level of professionalism expected, the staff member may be retained and subject to a continuing improvement plan with defined goals and metrics. As at-will employers both CAI and Colearn ESP may terminate employees without cause. However, every attempt will be made to retain employees and have them succeed and grow through the improvement process. Since the Executive Director reports directly to the Governing Board, any termination of the school leadership will require Governing Board approval.

Professional Development

<table>
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Meets Standard Expectation

- Sensible allocation of school vs. network responsibilities for professional development, including demonstrated understanding of and preparation for professional development needs that are common to all schools in the network.
- Professional development standards, opportunities, leadership, and calendar/scheduling that effectively support the education program and are likely to maximize success in improving student achievement, including an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program.
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1. Identify the person or position responsible for professional development.

The Executive Director at Colearn Academy Indiana will be responsible for overseeing and scheduling Professional Development. The Executive Director will work with Colearn ESP to develop a professional development scope and sequence that aligns with the school's collaborative goals as well as individual personnel goals of the staff. Colearn ESP has a library of professional development experiences, as well as hosts collaborative design workshops that empower educators and state staff to meet the needs of families at Colearn Academy Indiana. The professional development plan will incorporate any needs that have been exposed during the leadership and teacher evaluations. All Colearn Academy Indiana instructors and staff will have access to an online library of Professional Development resources and microcredentials at [BloomBoard](), and personalized recommendations will be made where appropriate by either the Executive Director or through the Colearn ESP support team.

2. Discuss the core components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform.

At Colearn Academy Indiana our staff will receive numerous opportunities for professional development. Our professional development program will be based on state requirements and any needs uncovered by surveys of professional staff, board members, students, parents and guardians, and other observations by stakeholders. Professional development will take place before the school year begins, and continue throughout the school year. The professional development focus may vary once our immediate needs our known, however, the initial plan will cover the following areas targeted for our instructional staff and new employees:

- State-required training in suicide awareness and prevention, Child Find screener, the MTSS process, and mandatory reporting
- Colearn Academy Culture and Innovative Model
- Instructional planning and implementation
- Student Engagement in the online environment
- Core Content
- Teaching to Multiple Intelligences
- Differentiated Instruction
- Social Emotional Learning
- Formative and Summative Assessments
- Data-driven Instruction

Throughout the year both instructors and Program Mentors (parents) will be provided with workshops on topics informed by evidence-based practices. These trainings are informed by many sources. These include but are Robert Marzano's *The New Art and Science of Teaching*; *Preparing Educators to Engage Families: Case Studies Using an Ecological Systems Framework* by Heather Weiss, M. Elena Lopez, Holly Kreider, and Celina Chatman-Nelson; *Classroom Instruction that Works: Research-Based Strategies for Increasing Student Achievement*; *Ungrading* by Susan D. Blum; *Hacking Instructional Design: 33 Extraordinary Ways to Create a Contemporary Curriculum*; *The Science of Rapid Skill Acquisition* by Peter Hollins; *Make it Stick: The Science of Successful Learning* by Peter C. Brown, Henry L. Roediger, and Mark A. McDaniel; *Neuroscience and Critical Thinking* by Albert Rutherford; *Flow: The Psychology of Optimal Experience* by Mihaly Csikszentmihalyi; *The Self-Driven Child* by William Strixrud and Ned Johnson; *Passion-Driven Education* by Connor Boyack; *How Children Learn* by John Holt; *Mindset* by Carol Dweck; *The Startup of You* by Reid Hoffman; *Building the Intentional University: Minerva and the Future of Higher Education* by Steve M. Kosslyn and Ben Nelson, Bob Kerrey, Joshua Fost, Judith Brown, Kara Gardner, and Daniel J. Levitin; and *Learning to Improve: How America's Schools Can Get Better at Getting Better* by Anthony Bryk, Louis M. Gomez, Alicia Grunow, Paul G. LeMahieu.

All Colearn Academy Indiana instructors and staff will have access to an online library of Professional Development resources and microcredentials at [BloomBoard](#), and personalized recommendations will be made where appropriate by either the Executive Director or through the Colearn ESP support team.

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

Prior to the first day of school Colearn Academy Indiana will conduct virtual inservice training and professional development to ensure that our instructional staff is prepared and fully understands the unique "colearning" model. In addition to this training our Education Specialists and Program Mentors will receive all required compliance training on child abuse, neglect, preventative supports, FERPA, IDEA, social-emotional learning, assessments, and state statutes unique to Indiana.

Teachers receive training in using full curriculum, supplementals, and how to administer diagnostic testing. Teachers will receive training on using the proprietary Colearn ESP technology to allow them to track attendance and communicate with families. Staff will receive training on how to balance work at home and provide support to online learners and parents for educating at home. Teachers will receive training on differentiating instruction, referring students to Student Services for support (emotional or educational), how to recognize gaps in education, and how to support SPED students.

Every year before the school year begins, the Instructional Staff will go through a proprietary Collaborative Design Workshop based on the methodology set out in the book *Understanding by Design*[1] during which Colearn ESP will facilitate an interactive discussion to codesign innovative instructional and learning methods. The approach will be based on "first principles" and will utilize various evidence-based frameworks, starting with John Hattie's "Visible Learning — 252 Influences And Effect Sizes Related To Student Achievement,"[2] Battele for Kids' "P21's Frameworks for 21st Century Learning,"[3] and The Institute for the Habits of Mind's "16 Habit's of Mind."[4] Also included in the discussion are methods of creating and measuring a depth of knowledge and understanding, utilizing Robert Marzano's "A New Taxonomy of Educational Objectives,"[5] Biggs and Collis' "SOLO Taxonomy,"[6] and the PISA Proficiency Scale.[7]

Program Mentors work directly with an assigned credentialed teacher (Education Specialist) to help provide guidance, lesson planning, and overall oversight of student learning. Program Mentors have the opportunity to attend Professional Development workshops weekly in a variety of topics, such as mental health, reading strategies, note-taking, math instruction, writing workshops, scheduling and organization, planning for college, etc. Program Mentors will also receive professional development in tracking academic standards and priority standards using a student notebook tool designed by Colearn. Colearn Academy Indiana will also host a Parent Conference with a variety of sessions based on parent surveys, Program Mentor surveys and feedback, as well as input from Education Specialists each year. This conference will coincide with Indiana ILEARN state assessments. While students are taking the state assessments at a centralized location, parents and Program Mentors will have the opportunity to engage in professional development and workshops to support their role and engagement in their child's education, development, and post-secondary planning.

[1]Grant Wiggins and Jay McTighe. Understanding By Design, 2nd Expanded Edition.
[2]John Hattie. Visible Learning. [Hattie Ranking: 252 Influences And Effect Sizes Related To Student Achievement.](#)
[3]Battelle for Kids. [Partnership for 21st Century Learning. P21's Frameworks for 21st Century Learning.](#)
[4]The Institute for Habits of Mind. [What are Habits of Mind?](#)
[5]Robert Marzano. A New Taxonomy of Educational Objectives.
[6]Biggs and Collis. Evaluating the Quality of Learning: The SOLO Taxonomy.
[7]PISA. [PISA for Development Technical Report.](#)

4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and how such time will typically be used.

As a virtual school, Colearn Academy Indiana can be flexible in scheduling our professional development. This flexibility will allow us to be more focused on individual professional development since those sessions will be virtual as well. Teaching teams and Program Mentors will be able to collaborate and plan virtually using online platforms whenever it fits into their individual schedules. The Executive Director will facilitate the professional development schedule, making sure that the scheduled events take place and that the participants are engaged. Formal teacher professional development days will occur on non-instructional school days.

Over the course of the typical school year there will be, at a minimum, 10 days dedicated to structured professional development. Professional Learning Communities (PLCs) and teaching teams will meet weekly to discuss strategies and participate in ongoing training to effectively engage students in the online environment. Data meetings are held after each round of benchmark testing to analyze data and have professional development provided by the diagnostic provider on interpreting data and individualizing instruction.

PERFORMANCE MANAGEMENT

Meets Standard Expectation
- Quality interim assessments that are aligned with (each) school's curriculum, performance goals, and state standards.
- Effective plan and system for measuring and evaluating academic progress – of individual students, student cohorts, and the school as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract.
- Comprehensive, effective plan and system for collecting and analyzing student academic achievement data, using the data to refine and improve instruction, providing training and support for school personnel, and reporting the data to the school community. This should include identification of the student data system to be used, as well as qualified personnel who will be responsible for managing and interpreting the data for teachers and leading or coordinating data-driven professional development.
- Thoughtful, appropriate corrective actions the school and network will take if either falls short of goals at any level, including explanation of what would trigger such actions and who would implement them.
- Sound plan for monitoring performance of the portfolio as a whole and thoughtfully considering portfolio performance in decisions regarding continued growth and replication.

1. In addition to all mandatory state assessments, identify the primary interim assessments the school(s) will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school's curriculum, performance goals, and state standards.

By philosophy and design, Colearn Academy uses a variety of performance indicators to assess student learning throughout the school year. CAI will use iReady diagnostic in August, January, and May to assess students progress in Math and Reading. Data from this diagnostic is used to work with parents or Program Mentors to develop individualized learning plans for students and determine interventions needed. Based on data in January, CAI will work with parents or Program Mentors of students who show no or low growth and potentially switch up their curriculum and/or supplemental curriculum to provide more one-on-one support to those learners.

Additionally, each student in grades 9-12 creates an annual portfolio of their work; produce deliverables for a public audience either through presentations, authentic and/or creative products, internships, publications, community projects, or competitions; and work collaboratively with other students and adult mentors to show mastery of learning competencies and personalized goals. K-8 students are assessed through a similar, albeit slightly less rigorous portfolio method. These students, with help from their Program Mentors, use tools such as Bulb, Bookcreator.com or a Google Photos slideshow to record completion of their projects, share with others, and reflect on the work. This reflection time is crucial in deepening the cognitive gain accomplished from the completion of the projects, which are based on state standards.

CAI does not "teach to the test," though it does use formative assessments as important data points. "Rather than relying solely on standardized tests, we now have the ability to keep track of what happens to students. And rather than relying on standardized proficiency targets, districts, schools and students can use better information to create individualized growth targets." CAI uses a personalized student dashboard to track student interests, strengths, aptitudes, learning goals, and experiential learning — which carry more meaning and insight than the scores of a standardized assessment. The most analogous assessment regime comes from the New York Performance Standards Consortium. The consortium lists its global rubrics for performance assessment across the curriculum. In her book The Test, Anya Kamanetz summarized "Performance Assessment Consortium schools in New York City

have nearly identical demographics to the city's public schools as a whole in terms of poverty, minority groups, English language learners, and those with disabilities. But their five year graduation rate is 10 percentage points higher — 76 percent vs. 66.1 percent, their dropout rate is 5.3 percent vs. 11.8 percent. And their graduates are far more likely to stay in college: 93 percent make it to their sophomore year, compared to 80 percent across New York State."

These interim formative and summative assessments allow for content lead teachers and Program Mentors to monitor student progress and learning of key concepts and standards. By monitoring student data frequently, Program Mentors and Content Lead Teachers can collaborate to develop strategies to help students who are not making adequate progress and provide support immediately to ensure student mastery of standards.

2. Explain how the school(s) will measure and evaluate academic progress – of individual students, student cohorts, student subgroups, and the school(s) as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain how the school(s) will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community(ies).

Colearn Academy Indiana will measure and evaluate academic progress of individual students, student cohorts, subgroups, and the school as a whole using benchmark data throughout the school year, as well as state assessment results. iReady benchmark data and state assessment data will allow CAI to analyze data based on individual students, cohorts, subgroups, and the whole school, which will allow CAI to identify trends and gaps in learning. This data will be reviewed to improve instruction by identifying gaps and needs, whether that is additional instructional resources, professional development, or adopting new curriculum. Additionally, teachers and program mentors will monitor formative and summative data throughout the school year to ensure student progress of standards. These variety of data points will help teachers identify students who need additional supports through the Multi-Tiered Support System (MTSS).

3. Identify who will be responsible for managing the data, interpreting it for classroom teachers, and leading or coordinating professional development to improve student achievement.

Coelarn Academy Indiana's Content Lead Teachers and school leaders will be responsible for managing and interpreting student data. Teachers will review data weekly, but will also look at the benchmark data after each benchmark to identify trends and address student needs. Based on benchmark and state assessment data, the school leader will lead and coordinate professional development based on the needs of the staff and student needs as identified in the data.

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

CAI's ESP will provide training and support for the school leadership and teachers in analyzing, interpreting, and using performance data to improve student outcomes. These training sessions will happen throughout the school year and cover a variety of student data topics: formative assessments, interpreting data from iReady, analyzing state assessment data, and using a variety of data to ensure student mastery of standards to improve student outcomes. Because the design of Colearn Academy Indiana allows for a variety of curriculum options selected by Program Mentors, teachers will receive ongoing support and training on how to manage and interpret data from a variety of sources to ensure student progress on standards.

In addition, teachers and Program Mentors commonly use various instructional technologies or formative assessment methods that enable data-driven feedback, decision making, intervention, and support. Examples include quiz games with Quizizz, Kahoot, and 99math. Core curriculum progress tracking in Accelerate, Kiddom, and Albert. Work Sample collection using our PATH unit portfolio method. Because the Colearn Academy model supports Program Mentor agency, and learner-driven choice, the tools themselves may change. However, as an organization we are building a culture of data-driven iteration to improve student learning to drive meaningful student achievement and growth.

5. Describe the corrective actions the school(s) will take if student academic achievement falls short of expectations and goals at the school-wide, classroom, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing them.

At Colearn Academy Indiana, we set high academic goals and standards for our students and collaboratively as an educational institution. To meet these goals, we provide robust professional development, top-notch curriculum and instruction platforms, and formative and summative assessments in order to differentiate instruction for all our students.

For individual students whose achievement may fall below our standard we have the following process in place:
- The Education Specialist will meet with the students' parents/guardians to discuss the current academic achievement gap and suggest ways to close the gap. They may suggest a different curriculum or supplemental curriculum that is available.
- Monthly academic and proficiency goals will be set for the student
- Monthly meetings will continue to track the students' progress.
- If progress is not achieved within 90 days after adjustments and interventions, then the student may be referred to the Special Education department for assessment. Retention may be suggested if warranted.
- K-8 grade students may participate in remediation programs for credit recovery, summer remediation, or intensive reading or math instruction before, during, or after the regular school day the next academic school year.

Our intervention policy consists of the following:

The Education Specialist is the primary contact for any concerns that a Program Mentor has regarding academic progress, behavior, or social-emotional wellbeing. They will recommend any appropriate academic interventions and accommodations. In the event that additional concerns regarding student progress arise, the Program Mentor and/or Education Specialist can request a Student Study Team (SST) to be held. This meeting will document the concerns of school staff, the Program Mentor, and families, and will identify any interventions attempted and possibly recommend additional interventions. Interventions should be attempted for 6-8 weeks and a second SST meeting will be held to document the student's response to intervention. Depending on the outcome of the interventions, additional resources and recommendations may be made by the SST team.

If our school-wide academic goals are not met the Governing Board will be responsible for forming a school improvement team that consists of all stakeholders. This team will complete a comprehensive needs assessment and create a continuous improvement plan that covers all of the school functions: academic, operational, fiscal. The team will collaborate to find the root cause of the academic decline and formulate a plan to improve.

FACILITIES

If the applicant is seeking an existing public school facility made available by the authorizer, complete Part A and Part B. If you intend to identify and operate in an independent facility, complete only Part B.

Part A: Existing Public Facilities (If available)

> **Meets Standard Expectation**
> - Complete and compelling response to the facilities needs assessment aligned with the educational program and anticipated student population.

1. Describe the basic facility(ies) requirements for accommodating the school(s) plan, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities.

Not Applicable.

2. List your anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include but are not limited to the following:
   - Science labs, art room (with or without kiln), computer labs, library/media center, performance/dance room, auditorium, etc.

Not Applicable.

3. List your anticipated administrative/support space needs, including anticipated number of each. Administrative/support space needs may include but are not limited to the following:
   - Main office, satellite office, workroom/copy room, supplies/storage, teacher work rooms, etc.

Not Applicable.

4. List which, if any, of the following are essential to fulfillment of the core athletic program:
   ● Gymnasium, locker rooms, weight rooms, field(s) (football, soccer, multipurpose), baseball/softball field

Not Applicable.

5. Identify any other significant facilities needs not already specified, including:
   ● Playground, large common space for assemblies and other large group meetings, etc.

Not Applicable.

6. Does the applicant have a specific desired location(s) from those being made available by the authorizer?

   ☐ Yes   X No

   If yes and the applicant has a specific facility(ies) under consideration, identify by current school(s) name and/or neighborhood(s).

   Desired Location(s):

7. Is the applicant willing to share the facility(ies) with another school(s)?

   ☐ Yes   X No

8. Discuss contingency plans in the event you do not receive a facility(ies) from the authorizer.

Not Applicable.

Part B: Independent Facilities

Meets Standard Expectation
● Sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population.

1. If you intend to operate in an independent facility, describe the process for identifying and securing the facility(ies), including any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc.

Colearn Academy Indiana will have one main office in the state to be used for administrative offices only and not as an extension of the school for families to utilize nor for educational purposes other than those needed to administratively support the staff and students. The leased space will have at minimum two rooms in order to have a main office for the Executive Director and Registrar/Receptionist, and another room to utilize as a workroom and storage. We will be engaging a broker to navigate the real estate market. Attachment 23 provides a sampling of the current available office spaces that may be under consideration.

The Application Team has chosen to locate the school office in the Indianapolis area. Indianapolis is central to the counties Colearn Academy is targeting for marketing and student enrollment. Additionally, since Board Meetings are required to be held in-person, a central location for our school office will make traveling to those meetings manageable for our Governing Board members from the outlining counties. We have been in touch with a realtor in the area and plan on executing a lease agreement no later than April of 2023, the estimated costs of the lease are included in the budget and staffing workbook.

2. If you currently hold a facility or have an MOU or other proof of intent to secure a specific facility, please provide proof of the commitment as **Attachment 23**.

3. Briefly describe the facility(ies) including location, size, and amenities. You may provide, as **Attachment 24**, up to 10 pages of supporting documents providing details about the facility(ies). Charter school facilities must comply with applicable state,

local, and authorizer health and safety requirements. In addition, charter school applicants must be prepared to follow applicable city planning review procedures.

Not Applicable.

START UP & ONGOING OPERATIONS

Meets Standard Expectation
- Detailed start-up plan specifying tasks, timelines, and responsible individuals, which is aligned with sound Start-Up Budget.
- *(If the school will provide transportation)* Sound plan for student transportation, including both daily and special-event transportation.
- Sound plans for school and student safety and security, including security personnel, technology, equipment, and policies.
- Plan to secure comprehensive and adequate insurance coverage, including workers' compensation, liability, property, indemnity, directors and officers, automobile, and other.

1. Provide, as **Attachment 25**, a detailed start-up plan for the school/network, specifying tasks, timelines, and responsible individuals. This plan should align with the Start-Up (Year 0) Budget and Staffing Workbook, that will be included as Attachment 28.

2. If the school(s) will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school(s) plans to meet transportation needs for field trips and athletic events.

No transportation will be provided.

3. Provide the school's plan for safety and security for students, the facility(ies), and property. Explain the types of security personnel, technology, equipment, and policies that the school(s) will employ.

The majority of our safety and security measures focus on cyber security and appropriate technology use since Colearn Academy Indiana is a virtual school. The secure technology will be provided by Colearn ESP. Our Discipline policy addresses the consequences of inappropriate use of technology and any of our online platforms. In order to provide a safe and secure environment for our students while on class excursions, field trips or internships. Colearn Academy Indiana policy states that our volunteers, Program Mentors and any other adult that may regularly come in contact with students must agree to a criminal background check, and it comes back clear, before spending any length of time with students.

4. Provide, as **Attachment 26**, a list of the types of insurance coverage the school(s) will secure, including a description of the levels of coverage. Types of insurance should include workers' compensation, liability to indemnify the school, its board, staff and teachers against tort claims, property, directors and officers, automobile, and other.

OPERATIONS CAPACITY

Meets Standard Expectation
- Individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as staffing, professional development, performance management, school start-up, general operations, and facilities management.
- *(If proposing an independent facility)* Demonstrated experience in facilities acquisition and management, including managing build-out and/or renovations.

1. Describe the applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:
    - Staffing, professional development, performance management, general operations, and facilities management

Colearn Academy Indiana and Colearn ESP are both new not-for-profit education focused organizations. Their foundation and core are built around the already established Colearn Club, Inc., whose founders and partners have joined together to create both CAI and Colearn ESP. Detailed below are the individual and collective qualifications of the Applicant Team which highlights the capacity to implement the Operations Plan for the school successfully.

A board member for Colearn Academy Indiana, Ben Kornell, was Chief Operating Officer for Envision Education, a network of three high performing charter schools in the San Francisco Bay Area. He intends to help contribute operational advice at the Governing Board level to the Executive Director.

Colearn Academy Indiana Board Member Tim O'Connor is Chief Marketing Officer of Excelligence Learning Corporation. Excelligence is a large national employer with 1600 employees across the United States, including over 70 in Angola, Indiana. It is the largest school supply ecommerce retailer outside of Amazon, and it is the largest education products seller for education and learning products for children on Amazon itself. His previous experience with PCDI, which is the umbrella organization for several college degree and diploma granting distance learning institutions, gives him extraordinary insight and procedural knowledge of data-driven enrollment marketing and business metrics related to student enrollment and retention for both high school, trade school, and college at the scale of tens of thousands of students. He intends to help contribute operational advice at the Governing Board level to the Executive Director.

Organizational History:

In 2016, Colearn Club, Inc. was inspired through a codesign process with parents who were homeschooling their children. Michael Staton, Partner at Learn Capital, and Vinit Sukhija, Principal at Learn Capital, worked with thought-leading parents in Silicon Valley, including Marcy Delgado and Lisa Betts-LaCroix, who were self-organizing events for education technology companies to meet parents and homeschoolers. These parents approached Michael and Vinit to ask which technology tools would serve homeschooling families well.

Given that Michael had spent the last ten years at four different education technology startups and was a senior partner at Learn Capital, and Vinit had run the Social Entrepreneurship & Innovation Initiative at Teach For America where he taught design thinking to teachers across the country, Michael and Vinit felt this void of services for homeschooling might provide an opportunity worth pursuing. They hosted extended codesign sessions with groups of 6-10 parents, and presented research results and solutions to over 50 parents in an "Idea Share." Parents and kids were enthusiastic by several ideas that originated through the research, and Michael and Vinit were encouraged to try to build solutions.

Almost all parents felt like "homeschooling" and "unschooling" are inappropriate stereotypes: They are not at home, they are out in the world learning from all available resources; it's not school, it's a collective of families learning together in whatever spaces they have at their disposal. Parents said "coworking is a thing now, why isn't colearning a thing?" Thus, Colearn-Club was born.

Around the same time, students at the Stanford Learning Design and Technology Program had Michael Staton and Vinit Sukhija as guest lecturers. A student project was to redesign Virtual Charter Schools. The two ideas converged.

For-profit Colearn Club incorporated in late 2018 and spent the greater part of 2019 creating the proprietary web applications necessary to incorporate their innovative ideas into real world educational success.

Colearn Club, Inc. chose the fertile and "Charter friendly" state of Arizona to apply for and receive their first Charter, Colearn Academy Arizona in 2020. Colearn Academy Arizona's first year of operations was this past year (FY22). During the course of that school year, and the ensuing student successes that were observed, along with excited parents and students, it was apparent that this innovative "colearning" model could increase student success in other states. Thus, the Applicant Team was formed and began researching the possibility of expanding. This research, and after seeking legal counsel, led to the formation of a new not-for-profit corporation, Colearn ESP, which will function similarly to the for-profit Colearn Club, Inc. Colearn ESP will have the backing and support and resources, if necessary, of Colearn Club, Inc. Colearn Club, Inc. has a proven track record of operating, staffing, general management, professional development and technology development for both home schooled students and Charter School students. This expertise is what will be utilized at Colearn Academy Indiana.

The Applicant Team has worked closely together to design this new virtual educational space, and have successes in previous ventures and employment in staffing, professional development, performance management, general operations, and facilities management as noted below in their qualifications.

Applicant Team Qualifications:

Michael Staton is the co-founder and CEO of Colearn-Club, Inc. For the past decade, he was a Partner at Learn Capital, where he has helped lead investments into over 100 EdTech companies, including Outschool, Prenda, Coursera, Minerva, Photomath, and Brilliant. Prior to Learn Capital, Michael worked as a co-founder of DevBootcamp – the first coding bootcamp which grew to six cities and graduated over four thousand students. Under his leadership DevBootcamp grew from one campus in San Francisco to six campuses in six cities, from eight employees to nearly one hundred, from 20 concurrent students in one city to 480 across six cities. As a founder at Uversity (now TargetX), Uversity's pioneering work in Postsecondary Education earned the company the first-ever venture investment from the Gates Foundation's US Programs. Starting his career as a public school teacher, Michael served as a Venture Partner and Community Advisor to NewSchoolsVenture Fund's Seed Fund, now Reach Capital. Additionally, he has had early roles, befriended and advised many EdTech companies (including Kahoot, Clever, ClassDojo and Quizlet), making him sought after by founders, events, and policymakers.

Mandi Bateman, Chief Operating Officer for Colearn-Club, Inc, has extensive experience in business development and administration, project management, and operations for a range of technology and education focused enterprises. As a creative and versatile leader in technology, Mandi leverages her exceptional strategic planning and project management skills in high-pressure environments to advance innovation.

Kimberly Phillips, the Director of Growth and Expansion for Colearn-Club, Inc., is an experienced educator who has built charter school programs from the ground up in multiple states. With her deep experience in charter school administration, Kimberly brings a wealth of knowledge and experience to the Colearn team.

Amber Robinson, the Executive Director for Colearn Academy Arizona, Amber brings over 15 years of educational experience and virtual learning to the team, including Northstar Academy, Odyssey Online Learning School, and University of Phoenix. She has served in many roles in education from teaching, mentoring new teachers, overseeing departments, and curriculum development. As both a parent and educator, she desires to see students succeed in the learning environment that is best for each student. Her desire is to support and encourage not only students and teachers, but also parents/guardians. She believes that if all parties involved work together as a team that all students can be successful in their educational journey. With her passion for home education and desire to help all students succeed, she provides not only extensive knowledge in curriculum, but also compassion and awareness to the team for diverse learners and families.

2. Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Not Applicable.

3. **Replication Schools:** Provide an implementation schedule, as **Attachment 27**, that explains the strategy for executing each charter that is approved.

SECTION IV: FINANCIAL PLAN & CAPACITY

FINANCIAL PLAN

Meets Standard Expectation
- Draft financial procedures, policy, or other reasonable assurance that the operator will have sound systems, policies and processes for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls, ensure compliance with all financial reporting requirements, and conduct independent annual financial and administrative audits.
- Evidence that the school's leadership has a strong understanding of the appropriate delineation of roles and responsibilities among the administration and governing board regarding school finance.
- Evidence that the school will ensure financial transparency, including plans for public adoption of the school's budget and public dissemination of its annual audit and an annual report.
- Sound criteria and procedures for selecting contractors for any administrative services and the acquisition of liability insurance.
- Complete, realistic, and viable start-up and five-year operating budgets.

1. Describe the systems, policies and processes the network/school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.

Our ESP provider, Colearn ESP has a central fiscal office team and also we also will contract with a third party accounting firm to maintain accurate accounting, billing, and cash control policies, procedures, and records which are consistent with Generally Accepted Accounting Principles (GAAP), and which meet the requirements of State and Federal statutes and regulations. The financial control system is designed to track and safeguard all assets, assign all expenditures according to the coding requirements (local, state and federal), maintain appropriate records, and ensure fiscal responsibility of the school.

The Governing Board of Colearn Academy Indiana will establish and maintain effective administrative guidelines to implement internal control standards and procedures consistent with the State Board of Accounts, including financial grants and awards from Federal and State sources.

The Governing Board must approve expenditures over $20,000, except for expenditures required by local, state or federal statute, such as annual insurance, payroll expenses and taxes, management fees, and ongoing contractual services.

Our financial internal control policy and procedures shall provide reasonable assurance that transactions are properly recorded and accounted for in order to permit the preparation of reliable financial statements that are consistent with Federal and State reporting requirements; maintain accountability over assets; and demonstrate compliance with Federal and State statutes, Federal and State regulations, and the terms and conditions of any awards as applicable. Our financial internal control system includes the following:

Controls for processing income:
Local income received via our internet portal, state per pupil income, and federal grant income will be posted to the general ledger by the contracted accounting service. Local income sent in via USPS or hand delivered will be documented by the administrative staff. The deposit will be verified and deposited by the site Executive Director. This separation of duties creates the accountability system necessary to achieve financial integrity.

Controls for expenditures:
● Purchase Orders:
   ○ Purchase Orders will be necessary for local purchases of computers, field trips, student supplies, other equipment and curriculum materials
   ○ Completed Purchase Orders are approved by the Executive Director, who will have the responsibility for verifying the available funds against the budget and approving the request as a necessary purchase.
   ○ The Executive Director will submit a copy of the purchase order to the accounting contractor for expense fund accounting tracking purposes.
   ○ Once authorized, the staff member is responsible for making the purchase, and upon delivery, sending the documentation to the appropriate personnel for remittance.
● Invoices:
   ○ Invoices received will be approved for remittance by the Executive Director and sent to the accounting contractor for payment. Ongoing, regular payments for such items as insurance, curriculum, and instructional supplies shall be sent directly to the accounting contractor for remittance.

Payroll and Benefits controls:
● Payments to Employees:
   ○ All payments to employees for services rendered will be processed through the payroll system by a third party payroll processor. This includes bonuses, stipends, and additional duty compensation.

- ■ Colearn ESP may elect to choose a Professional Employer Organization rather than a payroll system to streamline compliance issues and tax filings. This is functionally a payroll provider, though they offer more services.
    - ○ Any spending for teacher appreciation and/or employee gifts will be approved in advance by the Board and be only in alignment with the budget and with laws, rules, and regulations relating to public school spending.
    - ○ No employee reimbursement payments shall be made except from a receipt.

Reconciliation and review:
- ● Bank Statements must be reconciled each month. Online banking access will be available to the accounting contractor for the purpose of retrieving monthly bank statements for reconciliation and for cash flow monitoring.
    - ○ Reconciliation of the bank statement(s) must be made within a reasonable period of time after the start of the new month.
- ● Financial Statements:
    - ○ The following schedules are required for presentation to the Board for review each month:
        - ■ Income Statement – Actual vs Budget for the Month and YTD
        - ■ Balance Sheet – Month End account balances

Indiana state statute requires schools and other government entities to implement a specific internal control methodology. As a new charter school, Colearn Academy Indiana will adopt and implement financial policies and procedures to ensure the school is compliant with the statute and the accompanying regulations from the State Board of Accounts (SBOA). In addition, the school will train its staff and prepare written certification on SBOA forms. Our ESP and accounting contractors will help ensure the school's internal control methodology is compliant. Before the school opens, the school board will approve a complete set of financial controls to implement.

2. Describe the roles and responsibilities of the network/school's administration and governing board for school finances and distinguish between each.

Colearn Academy Indiana will be a "single site" virtual school and not part of a Network of Schools in Indiana. Therefore the daily day-in, day - out fiscal roles and responsibilities for the school fall mainly with the school administration. The Executive Director and other administrative staff will be responsible for executing purchase orders, routing invoices, reporting time & effort for payroll, local bank deposits, and supply orders and tracking. The Executive Director will also be required to have knowledge of the schools budget and be available for any questions the Governing Board may have about purchases. Colearn ESP, as charged by the Governing Board, is tasked with providing oversight to the Executive Director concerning budgeting, the annual audit and any fiscal reporting requirements both Federal and State. The Board will receive reports at each Governing Board meeting which will include an Income Statement – Actual vs Budget for the Month and YTD, a Balance Sheet, Cash Flow statements and enrollment updates. The Governing Board responsibilities will also include engaging the CPA for the annual Audit, assisting in financial forecasting and overseeing the internal financial controls.

3. Describe the process and procedure for conducting an annual audit of the financial and administrative operations of the network/school.

Colearn Academy Indiana will be audited by an external auditor as a part of our consolidated annual audit. The audit will be completed in alignment with the Indiana State Board of Accounts and Authorizer requirements.

4. Describe how the network/school will ensure financial transparency to the authorizer and the public, including the anticipated costs and criteria for selecting such services.

As a public charter school, Colearn Academy Indiana will be financially open and transparent and will comply with all public records requests per Indiana law. CAI will engage an independent Certified Public accountant to perform the SBOA financial and compliance audit on an annual basis. We estimate first year audit costs to be $12,000.

Additional financial transparency will include monthly financial reports to the Governing Board that include all financials, a comparison to budget, and variance analyses. CAI policies will maintain clear segregation of responsibilities on all financial transactions and have a multi-level approval for all expenditures.

5. Describe any services to be contracted, such as business services, payroll, and auditing services, and include the anticipated costs and criteria for selecting such services.

Colearn Academy Indiana will contract with Colearn ESP which will provide the majority of anticipated contracted services the school will utilize. Below is a list of services that are currently being considered for contract services:

- Innovative, Proprietary Program Offerings and Curriculum
- On-Demand Master Instructional Staff
- Instructional and Learning Technology Stack
- On-Demand Academic Leadership Staff
- Unlimited Colearn Platform License
- Operational Technology Stack
- On-Demand Operational Support Staff
- Professional Employer Organization Services
- Human Resources Services
- Talent and Recruitment Services
- Hardware and Device Management Services
- Bookkeeping, Accounting and Financial Services
- Legal and Legal Advisory Services
- Compliance and Regulatory Support Services
- Insurance and Risk Management Services
- Crisis Management Services
- Records Management Services
- Professional Development and Instructional Support Services
- Custom Design Services
- Custom Software Engineering Services
- Platform Hosting and Maintenance Services
- Information Technology Procurement Services
- Enrollment Management and Marketing Services
- Website Hosting and Maintenance Services
- Intangible Assets

These service expenses and cost basis can be found in our Budget and Staffing Workbook. Additional contracted services will include a registered CPA firm to perform the annual audit and a third party accounting firm to ensure financial accountability.

No other contracted services have been acquired or decided at this time.

6. Submit, as **Attachment 28,** the Budget and Staffing Workbook. In developing the budget, please use the per-pupil revenue projections provided by the authorizer and ensure all tabs are completed.

7. Submit, as **Attachment 29**, a detailed narrative of the assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. Specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising). Include the following in the narrative:
    - Per-Pupil Revenue
    - Anticipated Funding Sources: Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of commitment for any funds on which the school's core operation depends.
    - Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

FINANCIAL MANAGEMENT CAPACITY

Meets Standard Expectation

- Individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as financial management, fundraising and development, accounting, and internal controls.

1. Describe the applicant team's individual and collective qualifications for implementing the Financial Plan successfully, including capacity in the following areas:
   - Financial management;
   - Fundraising and development;
   - Accounting and internal controls.

The Applicant Team for Colearn Academy Indiana, has the ability to implement the Financial Plan with fidelity. Their experience and successful track record are previously described in the application. In conjunction with Colearn ESP, and previously with Colearn Club, Inc, the entire team has the necessary experience in school leadership, personnel development, management, accounting, fundraising, academic support, and back-office support. Along with the initial Applicant Team and Colearn ESP, the school will contract with a third party vendor to complete the necessary separation of duties for internal financial control and fidelity of the financial process. The third party vendor is responsible for maintaining accurate accounting, billing, and cash control policies, procedures, and records which are consistent with Generally Accepted Accounting Principles (GAAP), and which meet the requirements of State and Federal statutes and regulations. The financial control system is designed to track and safeguard all assets, assign all expenditures according to the coding requirements (local, state and federal), maintain appropriate records, and ensure fiscal responsibility of the school.

Applicant Team Qualifications:

Michael Staton is the co-founder and CEO of Colearn-Club, Inc. For the past decade, he was a Partner at Learn Capital, where he has helped lead investments into over 100 EdTech companies, including Outschool, Prenda, Coursera, Minerva University, Podium Education, Photomath, Desmos, Clever and Brilliant. Prior to Learn Capital, Michael worked as a co-founder of DevBootcamp (sold to Kaplan) after being the founder and CEO of Uversity (sold to TargetX). Uversity's pioneering work in Postsecondary Education earned the company the first-ever venture investment from the Gates Foundation's US Programs. Starting his career as a public school teacher, Michael served as a Venture Partner and Community Advisor to NewSchoolsVenture Fund's Seed Fund, now Reach Capital. Additionally, he has had early roles, befriended and advised many EdTech companies, making him sought after by founders, events, and policymakers.

Mandi Bateman, Chief Operating Officer for Colearn-Club, Inc, has extensive experience in business development and administration, project management, and operations for a range of technology and education focused enterprises. As a creative and versatile leader in technology, Mandi leverages her exceptional strategic planning and project management skills in high-pressure environments to advance innovation.

Kimberly Phillips, the Director of Growth and Expansion for Colearn-Club, Inc., is an experienced educator who has built charter school programs from the ground up in multiple states. With her deep experience in charter school administration, Kimberly brings a wealth of knowledge and experience to the Colearn team.

Amber Robinson, the Executive Director for Colearn Academy Arizona, brings over 15 years of educational experience and virtual learning to the team. She has served in many roles in education from teaching, mentoring new teachers, overseeing departments, and curriculum development. As both a parent and educator, she desires to see students succeed in the learning environment that is best for each student. Her desire is to support and encourage not only students and teachers, but also parents/guardians. She believes that if all parties involved work together as a team that all students can be successful in their educational journey. With her passion for home education and desire to help all students succeed, she provides not only extensive knowledge in curriculum, but also compassion and awareness to the team for diverse learners and families.

SECTION V: PERFORMANCE EVALUATION INFORMATION

(Only Applicable for Network Schools)

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

1. Submit the Historical Performance Workbook (provide the completed workbook as **Attachment 30**, and be sure to complete all sheets in the Workbook).

2. Select one of the consistently high-performing schools that the organization and/or ESP/CMO operates and discuss the school's academic performance. If possible, select a school with similar demographics to the targeted student population in the application.
    ● Describe the primary causes to which you attribute the school's distinctive performance.

Not Applicable.

    ● Identify any notable challenges that the school has overcome in achieving results.

Not Applicable.

    ● Explain the ways in which the school's success has informed or affected how other schools in the network or organization operate, including how the effective practice, structure, or strategy was identified and how it was implemented elsewhere.

Not Applicable.

3. Select one of the network's or organization's schools whose performance is relatively low or not satisfactory and discuss the school's academic performance. If possible, select a school with similar demographics to the targeted student population in the application.
    ● Describe the primary causes to which you attribute the school's performance.

Not Applicable.

    ● Explain the specific strategies that are being employed to improve performance.

Not Applicable.

    ● Identify how you know when performance is satisfactory. Include the expectations for satisfactory performance in terms of levels and timing.

Not Applicable.

4. For all schools operating in the state of Indiana, provide as **Attachment 31** (a) the last three years of audited financial statements for the school(s) and (b) the most recent internal financial statements, including balance sheets and income statements for the organization and any related business entities. Be sure that the school level, ESP/CMO level, and the overall operations are distinctly represented.

5. For the organization as a whole and any related business entities, provide the following as **Attachment 32**: (a) the last three years of audited financial statements and management letters; and (b) the most recent internal financial statements including balance sheets and income statements. Be sure that the ESP/CMO level and the overall operations are distinctly represented.

6. List any contracts with charter schools that have been terminated by either the organization or the school, including the reason(s) for such termination and whether the termination was for "material breach."

Not Applicable.

7. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization and explain.

Not Applicable.

8. Explain any performance deficiency or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years, and how such deficiencies or violations were resolved.

Not Applicable.

9. Identify any current or past litigation, including arbitration proceedings, by the school, that has involved the organization or any charter schools it operates. Provide, as **Attachment 33**, a summary of the following information: (a) the demand, (b) any response to the demand, and (c) the results of the arbitration or litigation.

Not Applicable.