



Colearn Academy Utah
New Charter School Proposal



Required Information

Charter School Information

1. Name of Proposed Charter School: Colearn Academy Utah
2. Name of Applicant: Colearn Utah
3. Authorized Agent: Kim Phillips
4. Mailing Address: 8977 S 1300 W #2070, West Jordan, UT 84088
5. Phone Number: 520-342-0045
6. Email Address: kim@colearn.com
7. New School Location and Location's School District(s): Virtual

Governance Structure

Name	Position	Area of Expertise	Any Charter Affiliations
Kim Phillips	Board Chair	Co-Learn Club, Inc. Charter Development	None
Amber Robinson	Board Member	Academics and Curriculum	Colearn Academy Arizona
Rebecca Raymond	Future Board Member	Utah Homeschooling	Charter School Parent
Teri Lisa Stagg	Board Member	Utah Public Schools	None
Rebekah Krueger	Board Member	Charter School Finance/Operations	Colearn Academy Arizona and A+ Charter School Board Member

Enrollment

8. Year School will start: Fall 2024

9. Grades Served: K-12

Does the proposed grade configuration match the resident district grade configuration?

X Yes

No: *Describe the difference.*

10.	10. Grades and Specific Number of Students Served by Grade													Max Enrollment
Year 1	K	1	2	3	4	5	6	7	8	9	10	11	12	
SY 24-25	17	17	17	17	18	18	18	18	18	15	15	15	15	218
Year 2	K	1	2	3	4	5	6	7	8	9	10	11	12	
SY 25-26	25	25	25	25	25	25	25	25	25	20	20	20	20	305
Year 3	K	1	2	3	4	5	6	7	8	9	10	11	12	
SY 26-27	35	30	30	30	30	30	30	30	30	25	25	25	25	375

Waivers

11. Is this proposal seeking special treatment under UCA §53G-5-301?

Yes: *Provide a justification.*

X No

12. Is this proposal seeking priority consideration under UCA §53G-5-504?

Yes: *Provide a justification.*

X No

A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter.

13. List any waiver requests here (i.e., Rule numbers and titles).



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Signatures

WE, THE UNDERSIGNED, do hereby certify that, to the best of our knowledge and belief, the data in this proposal are true and correct. Therefore, this proposal for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.

Name of Authorized Agent **Kim Phillips**

Signature of Authorized Agent *Kim Phillips*

Name of Charter School Board Chair (if different than Authorized Agent)

Signature of Charter School Board Chair (if different than Authorized Agent)

1. Key Elements

1a. State the proposed school's mission.

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

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.

1b. State the legislative purpose(s) outlined in UCA 53G-5-104 which this school specifically satisfies.

Based on the legislative purposes of a charter school, Colearn Academy Utah satisfies the following legislative purposes outlined in UCA 53G-5-104 to apply for a charter school:

Purpose 1: Continue to improve student learning

Rationale: Colearn Academy Utah's model has a proven track record of improving student learning in another state: Arizona. Based on student outcomes and research, CAU's model has produced improved student learning and outcomes through parent engagement and partnerships; student autonomy and agency; and relevant learning enrichment through clubs, activities and field trips, resulting in improved student outcomes.

Purpose 4: Increase choice of learning opportunities for students

Rationale: Colearn Academy Utah is founded on different and innovative teaching methods by embodying family choice in educational philosophy and curriculum, as well as supporting families in those choices with certified teachers and academic support services for their students. CAU also provides a robust offering of curriculum for families to choose from for their student, as well as enriching learning opportunities through clubs, activities and field trips to enhance the student's learning experience.

Purpose 6: Provide opportunities for greater parental involvement in management decisions at the school level

Rationale: Colearn Academy Utah intentionally engages parents and families in decisions at the school level. This functions primarily at the curriculum choice level — allowing parents and families to select the best state standard-aligned curriculum suited for their child's individual needs. Colearn comes alongside families as a partner in the education of their children. Through the Colearn model, parents are encouraged to make decisions regarding the education of their student, as they know their child best.

1c. Explain how this school will promote the State Charter School Board's mission and vision.

Colearn Academy Utah's mission and vision is in alignment with the mission and vision of Utah's



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State Charter School Board. Colearn is committed to providing choice and support for parents and students by partnering with families in the education of their children, thus creating “co-learning” opportunities.

By design, Colearn offers families quality choices and innovates what education can look like for a student through the flexible model it offers. Colearn partners with families in choosing the best curriculum for the individual needs of their students. Colearn empowers families in the home education process by providing support from certified teachers, academic support services, as well as mentoring for the planning and implementation of the curriculum through pacing that fits the needs of the student and family. By partnering with families and providing top-tier support, each student’s individual needs are met, thus removing barriers for a student to reach the highest level of individual success, socially and academically. Colearn’s model includes tools and resources for planning and pacing standards-aligned curriculum, weekly and monthly check-ins from Colearn teachers and staff, and individualizing the learning process based on the needs of the student. Colearn does not just enroll a student and assign them to an online learning platform and hope for the best, but rather is intentional by design to ensure engagement and partnerships from families and students in the learning process.

1d. List the school’s key elements. The key elements of the Charter School, as set forth in the application, are programs and processes that are defining characteristics and make this school unique.

Colearn Academy Utah’s key elements include several unique and defining characteristics that promote a high quality, virtual educational experience for each student. Each 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 Utah 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 **P**roficiency, **A**chievement, **T**alent, and **H**eart. 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.

CAU is dedicated to serving students of all learning styles. 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.



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According to research completed by the Director of Expansion and Growth, there are no similar models to the Colearn model in the state. Some schools offer 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.

1e. Describe the academic goals of this school.

Colearn Academy Utah is dedicated to serving students of all learning styles — especially students who benefit from a greater choice of school models and students who are best served schooling in a home environment. CAU’s goal is to continue serving all students through its unique platform and philosophy, while also adhering to the Utah Core Standards. By providing an innovative model in partnership with families and parents, Colearn is committed to seeing all students reach their greatest potential. This is accomplished through the design of the Colearn model, monitored through various academic data metrics throughout the school year and measured by the academic outcomes of students. In order to prepare each student to develop the competencies as part of the Utah Portrait of a Graduate,¹ Colearn Academy Utah focuses on the following goals:

1. Personalized Education
2. Rigorous Curriculum
3. Flexibility and Accessibility
4. Supportive Learning Environment
5. Parental Engagement
6. College and Career Readiness
7. Social and Emotional Development

By aligning with these academic goals, CAU partners with families of home-educated students in Utah to provide a comprehensive and enriching educational experience that meets the unique needs of each student, while nurturing their academic growth and personal development.

2. Program of Instruction

2a. Does the school intend to offer any of the following programs:

Career education is a focus of the charter school.

X Distance and/or online education will be offered.

A partnership with a four-year college or university to offer early college options will formed.

2b. Briefly present the overall vision for how the school will operate.

The learning environment at Colearn Academy Utah will be virtual, hybrid, independent self-study

¹ Utah’s Portrait of a Graduate. [Utah State Board of Education](#).



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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. 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 member 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 Utah Core Standards and provide guidance for differentiating based on the curriculum and needs of the students.

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 Utah 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.

2c. Describe the school’s overarching educational philosophy.

Colearn Academy Utah 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. CAU is an online public charter school, and as such, student achievement is made possible by — but certainly not limited to — online learning. All CAU students have unlimited access to the highest quality digital curriculum aligned to Utah Core Standards 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, CAU students form an active and engaged community within their community; the CAU online platform surfaces high rigor and high relevance engagement opportunities and facilitates “colearning” in the world and the students’ communities.

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.
- 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.
- We believe that education is more effective through “pull” rather than “push.”
- We believe that “school” and “home” must operate in harmony in order for students to make the greatest growth.
- 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 rapidly changing, at-times at an 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 toward parents.

2d. Provide a description of the intended educational program that includes methods of instruction and either sample curriculum choices or a description of how curriculum will be selected/developed.

Learning in Colearn Academy Utah 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 Utah 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 Utah in a compressed time frame by tapping into standards-aligned 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.

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:

Curriculum Choice

Students will have access to a variety of standards-aligned curriculum in the Colearn Planner, including established curriculum and online platforms that align with Utah Core Standards, such as Calvert Learning, Imagine Learning and Accelerate Education, while other curriculum will be used as supplemental and/or benchmarking material that will evolve and expand over time.

CAU'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. Teachers personalize each student's learning program, utilizing a blend of online learning platforms, textbooks, project based learning opportunities, literature, field trips, internships, and other resources.

2e. Provide a description of how the Utah Core Standards will be taught and assessed in the school.

The Colearn Academy Utah curriculum will meet Utah Core Standards. CAU curriculum providers will include Calvert Learning, Imagine Learning and Accelerate Education, which are fully aligned to Utah Core Standards.

Additionally, other supplemental curriculum providers that are used will be aligned with the Utah Core Standards. For instance, Amplify Education, McGraw Hill, Savvas Learning, and Studies Weekly show alignment with Utah Core Standards. CAU 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 Utah Core 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. Students, Program Mentors, and teachers will utilize the available Utah standards-aligned curriculum provided by the Colearn Planner 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.

Assessment Methods: This is an incredibly important component of CAU’s potential for success. While we use “traditional” benchmarks, Utah 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 good for families and students — they can be certain that their pupils are learning what they need to. It’s good for Utah — we can be sure that our future citizens have the skills needed to form a strong society.

2f. Explain how the school will meet the needs of all students, including special education students, advanced students, students with disabilities, educationally disadvantaged students, and the like.

Colearn Academy Utah will use multiple approaches and processes to identify special populations of students to best support their needs. CAU 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. Teachers and leadership will implement a Multi-tiered System of Supports (MTSS) if appropriate. 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.

During enrollment, families will inform Colearn Academy Utah if their child has an IEP or 504 Plan. The parent/guardian may provide a copy of the documents or CAU 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, CAU 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.

CAU 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



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on the needs of each individual student and as provided in the student's IEP.

CAU will meet the needs of English Learners as required by State and Federal law. Gifted and high ability students will be identified through a placement process and provided the most appropriate grade-level curriculum, pacing and teaching approaches from day one. Content Lead Teachers will work closely with Program Mentors or parent/guardian, and the Colearn Planner 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.

2g. If any grades 9-12 will be served, explain the proposed graduation requirements.

Colearn Academy Utah's graduation requirements will be aligned with the State Board of Education requirements for students in the Class of 2024 and beyond. Students must successfully earn a minimum of 24 credits to graduate from high school in Utah. The Colearn Planner will be automatically populated with Utah specific graduation pathway requirements and diploma types, as well as the Utah Portrait of a Graduate.

Beyond alignment with the Utah graduation requirements, the design of CAU 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, CAU 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.

2h. If any boxes were checked in 2a, please elaborate.

"Distance and/or online education will be offered." Colearn Academy Utah is an online academy. Instructional programs will be delivered virtually in students' homes.

3. Market Analysis

3a. State the school's intended location. Be as specific as possible. If the exact location is unknown, describe the characteristics of the areas the school will be seeking and how the governing board will find and acquire the location.

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. Colearn Academy Utah aims to enroll students from all regions of the state.

3b. Justify why this school's educational program is needed in the selected location.

According to the State Auditor dashboard,² Utah's four-year high school graduation rate holds

² High School Graduation Rates. [Office of the State Auditor](#).



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steady at about 88 percent, as of 2022. Economically-disadvantaged students, English Language Learners, students in racial groups and students with disabilities had a graduation rate lower than the overall percentage. Typically, virtual schools fall well below the state graduation rates, and Utah virtual schools are no exception. Colearn Academy's model will strive to fill that gap. Like most of America, the state of Utah has also seen a sharp uptick in families choosing at-home schooling for their children, beginning in the fall of 2020. Colearn will serve as a valuable resource to these identified student populations and families.

While some of these students may have opted to school at home, many are still attending local public schools. CAU 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. By providing a wide variety of curriculum choices for students and providing access to a built-in community of other learners along with Utah-credentialed teachers, all students have the opportunity to have their individual needs met. By providing access to synchronous live and interactive classes, students build relationships with other students and are known by their teachers, thus increasing student outcomes. 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. The innovative Colearn model differs from most other online or traditional school models to best meet the educational needs of each individual student.

3c. Provide the demographic information for the selected location.

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 Utah. Serving the entire state, Colearn Academy Utah will be able to focus its recruitment efforts 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. 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. Students in rural communities often lack access to resources found in densely populated cities for enrichment and engagement.

According to the most EdChoice Utah specific surveys, 8-12 percent of Utah families would prefer to school the students in a home environment; however, only 2 percent of families currently school their children virtually or at home.³ These families have indicated that they lack the expertise and resources to effectively teach and monitor their students' progress. Colearn actively works alongside parents, providing certified teachers and educational support not currently available to them.

3d. Explain in detail how the proposed mission, vision, and program of instruction align with the educational needs of the population described in 3c.

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

³ Utah Fast Facts. [EdChoice](#).



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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.

With this mission and vision in mind, CAU will address the needs of students in Utah by providing access to a built-in community of other learners along with opportunities to engage with our Utah-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 of students educated at home in Utah has increased since the beginning of the pandemic — an increase of 313 percent, according to *Utah Business*⁴ — there is an increased need for resources and support for parents new to educating at home. Colearn has a unique opportunity to serve these families, 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.

3e. Provide the characteristics of the proposed charter school that sets it apart from other schools in target location.

For the purposes of this proposal, we will use Utah Virtual Academy as the most comparable model to Colearn Academy Utah. Utah Virtual Academy uses K12 as its learning platform. Conversely, students enrolled in CAU will use the Colearn Planner — an innovative platform where students can track progress and attendance, choose from standards-aligned curriculum and supplementary activities, connect with families in their region and communicate regularly with Content Lead teachers. Teachers personalize each student’s learning program, utilizing a blend of online learning platforms, textbooks, project-based learning opportunities, literature, field trips, internships, and other resources. CAU students will receive additional support from a Program Mentor, who will help promote educational opportunities to the student’s preferred learning modalities.

The most recent recorded graduation rate for Utah Virtual Academy was 77 percent in 2022, a figure below the state average of 88 percent. CAU will strive to fill this gap with its unique model, one that gives students and families access to a variety of curriculum that aligns with state standards, as well as opportunities for engagement and enrichment through clubs, field trips, internships, and more. It is a model that adjusts to better serve the individualized needs of its students and communities served.

⁴ “Home-schooling: a new factor in the job market.” *Utah Business*. 6 June 2023.

Appendix A: Background Information Sheet

Name: Kimberly Phillips

Role: Board Chair

Statement of Intent: I have spent my career as a public school teacher, educational business entrepreneur, and charter school administrator. I have been working with families throughout Utah to develop a school program that meets their needs, empowers students, and utilizes a new model and approach to home and virtual education.

Not-for-Profit History: As the Director of Growth and Expansion for Colearn Club, Inc. I have been focused on establishing non profit organizations to serve students and their families throughout the United States. In addition, I was a founding member of the Colearn Arizona charter school team, and helped to build the school and programs from the ground up. I have an extensive background in charter school program development, marketing and enrollment, and team building. In the past 10 years, I have served as a charter school administrator at both Cabrillo Point Academy and Method Charter School in California. My time in these roles incorporated teacher oversight, developing new programs, compliance management, event planning, and marketing and enrollment.

Employment History:

Director of Growth and Expansion - Colearn Club, Inc - January 2022 - Present

Role includes spearheading new charter development in states, developing community partnerships and parent support for new schools, organizing community events and programs, overseeing applications and submission to new states, and helping to build and develop internal infrastructure to support growth.

Director of Engagement - Colearn Academy, Arizona - April 2021-January 2022

Founding team member for launch of new charter. Helped to build programs, policies and internal infrastructure to support growth. Responsible for onboarding independent contractors, developing partnerships within the community, marketing, enrollment, and student onboarding.

Regional Coordinator - Cabrillo Point Academy - 2017-2018, 2019-2021

Led a team of 9-13 teachers, providing compliance oversight, mentoring, leading staff meetings, and supporting teachers. Led marketing and enrollment initiatives, planned and implemented educational events and field trips. Facilitated state testing for the Orange County region. Held a roster of 40 independent study students overseeing their coursework, providing compliance oversight, mentoring and support.

Director of Homeschooling - Method Charter School 2018-2019

Founder of the Momentum program for homeschooled students. Hired and trained a team of teachers, responsible for all marketing and enrollment efforts, oversight of state testing and program compliance. Developed internal infrastructure to support the program. Planned and implemented weekly field trips and educational events. Onboarded and oversight of educational vendors, including all vendor compliance, billing and payments.

Education History:



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California Clear Credential - High Tech High School of Graduate Education, San Diego, CA
California Preliminary Credential - High Tech High School of Graduate Education, San Diego, CA
Bachelor of Arts, Social Relations - University of California, Riverside

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO THE UTAH STATE CHARTER SCHOOL BOARD TO VERIFY ANY INFORMATION PROVIDED. I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

A handwritten signature in black ink, appearing to read "Kurtley Peters", is written in a cursive style.

Applicant's Signature



Name: Amber Robinson
Role: Board Member

Statement of Intent: As a lifelong educator, I have spent over 15 years in education with 13 of those being in virtual education. It is my desire to bring a unique model to the families of Utah looking for more academic support and a virtual school that fosters community, accountability, and personalized education for all students.

Not-for-Profit History: I currently serve as the Executive Director of Colearn Academy Arizona. The school began as a for-profit charter school; however, under my leadership the school restructured the charter to become a nonprofit corporation and nonprofit charter school. I worked closely with the governing board and charter board to assist in restructuring.

As the Executive Director of the charter school, I oversee all operations and state compliance. It's important to maintain both compliance and integrity for the state of Arizona and the charter board association. I work closely with the governing school board to create and maintain annual budget, academic compliance, IDEA and state regulations for Special Education and English Language Learners. I understand the importance of school administration reporting financials, academics, and operations to the governing board monthly.

I previously served on the governing board of a nonprofit missions organization as the treasurer to oversee financials and budget planning for a small organization that sends missionaries in the field for small churches.

Employment History: For over 15 years, I have been actively involved in education as a teacher, mathematics curriculum author, department chair, administration, and operations. I assisted in starting a new charter from the ground up in Arizona. Worked closely with the charter board to extend our enrollment and transfer ownership from a for-profit entity to a nonprofit entity. With my background and continuous involvement in lifelong learning, I am prepared to oversee the charter in Utah and assist in accountability and compliance.

Education History:

University of North Carolina (2006), BA Mathematics
Kaplan University (2008), Masters of Teaching and Instruction, Special Education
Walden University (2012-2016), EdD Curriculum and Instruction
University of Arizona (2023-current), Masters of Education Administration

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Applicant's Signature



Name: Rebecca Raymond
Role: Board Member

Statement of Intent: I feel learning is a life-long endeavor and as much as I enjoy it first-hand, I love seeing others light up as they understand new information. I bring the experience of my years as a home-school teacher, to assist others in avoiding some common pitfalls and finding the best way to reach their students. I have many years of volunteer service in leadership positions, and also working in committees and councils to make the best decisions for all involved. I am fully committed to this program as some of these students are my own children.

Not-for-Profit History: I have over 25 years of service to the local community in various positions. Many of these opportunities involve assisting the local Christian community by teaching children character-building lessons through object lessons, stories, and music. The ages of these children have ranged from toddlers to teenagers. The work in leadership positions included working with teachers to adapt curriculum, assisting with special-needs children, and conflict resolution. Many of these leadership roles have been structured in committees where it is important to share opinions but also listen. I have assisted the local public and charter schools for eight years as an assistant to many different teachers with various teaching methodologies. Managing budgets of funds donated to Not-for-Profit organizations has also been a responsibility I have been entrusted with.

Employment History: From 1998 to 2006, I worked as a hair-stylist with responsibilities such as keeping a schedule, managing finances, and interacting with people of varying backgrounds. In 2006, I opened a small business, Hair by Rebecca, where I was owner/operator of a hair styling studio. All administrative tasks, along with services were my responsibility until late 2008, I closed shop in order to focus on the education of my children. In 2020, I began home-schooling during which I gathered experience in lesson preparation, multiple curriculums, and managing financial allotments for materials and activities. Networking with other home-schoolers was implemented to participate in field trips, games, activities, and compare ideas.

Education History: I successfully graduated in 1997 from Northridge High School, Layton Utah, with a cumulative GPA of 3.8. In 1998, I received a professional license for cosmetology in the state of Utah after completing Fran Brown College of Beauty.

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Rebecca Raymond

Applicant's Signature



Name: Teri-Lisa Stagg
Role: Board Member

Statement of Intent: I am an enthusiastic and highly competent professional who has excelled in various fields throughout my career. With a commitment to producing superior results, providing excellent service, and driving growth for her clients and employers, I have established myself as a valuable asset in the business and education communities.

My diverse skill set includes expertise in community outreach/relations, multimedia work, marketing/PR, professional writing, training/mentorship, non-profit management, and senior/retirement residential management. I am excited about the opportunity to reach more students in Utah through Colearn.

Not-for-Profit History: I have worked with various Not-for-Profit organizations and am dedicated to making a positive difference in my community by multiple volunteering and outreach efforts. As a breast cancer survivor, I have served with the Susan G. Komen and American Cancer Society organizations. I also volunteers with Rescue Me Society, and Special Olympics, as well as various hospitals and rehabilitation facilities within the local community
Community Volunteer/Outreach:

“Citizen of the Year” Award, Orlando, Florida: Given by Orlando Police Dept., Bravery in apprehending an armed fugitive.

Keynote Speaker: Susan G. Komen, American Cancer Society. As a breast cancer survivor, I am honored to serve at these events.

Ongoing support of the Rescue Me Society, Special Olympics, various hospitals, rehabilitation facilities, and others.

Employment History: My experience extends to the educational sector, where she works as a Work-Based Learning Specialist in the Granite School District. In this role, I provide career exploration and mentoring for students and families from grades K-12. My ability to connect with diverse populations, including students with varying abilities and cultural backgrounds, allow me to make a significant impact on their lives. I was instrumental in establishing the Business Partner Network and building strong community relationships. In my current role at Granger High School I also develop marketing materials, organize large-scale events, and supervise internships and job shadowing programs.

Outside of my professional endeavors, I have been involved in small business and nonprofit management. I co-founded King's Heroes, a children's foundation aimed at helping critically ill children by arranging visits with their "heroes." I worked closely with Larry King, the foundation's chairman, to establish and manage the organization effectively.

I also have experience as a corporate and freelance writer, creating persuasive and original copy for various purposes, including corporate communications, marketing, advertising, and motivational content. I have also authored a nonfiction book titled *You.Said.What?*, which was published by Medallion Press.



Colearn Academy Utah

As a motivational workshop developer and facilitator, I have been able to make a significant impact on high school students. By stimulating their awareness of their achievements and coaching them to express their accomplishments, she has helped students create successful essays and resumes for scholarships, employment opportunities, and college applications.

Education History:

Rollins College, Double Majors, Winter Park, Florida:

BA: Business Communications

Focuses: P.R., Public Speaking, Communications, Community Relations, Leadership

BA: Anthropology/Sociology

Focuses: Cultural Diversity Management, Gender issues and Progression, Gerontology, Mental Health and Progression of the Aged, Primate Research

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Teri-Lisa Stagg

Applicant's Signature



Name: Rebekah Krueger
Role: Board Member

Statement of Intent: As a Governing Board member of Colearn Academy Utah I bring years of experience working for and with Charter Schools. As a retired Charter School Operations Director and CFO, and current founder and president of Education Compliance Services, I have the financial and school operations background necessary for overseeing those aspects of Colearn Academy Utah. I am committed to using my years of Charter School expertise to help fulfill the stated Mission and Vision of Colearn Academy and am excited about the positive impact the school will have for the students in Utah.

Not-for-Profit History: I have multiple years of nonprofit work history, including the following positions:

1. Operations Director, Business manager and CFO for the nonprofit Arizona Charter Solutions (CMO for the LEAD Charter School Network) 14+ years
2. Church Board member 10 years (Budget committee member)
3. Current Governing Board Member: A+ Charter School (AZ), Colearn Academy Arizona, Beat the Odds Basketball Academy

Additionally, I have participated in the Charter Application process, helping write successful Charter Applications for current Charter Operators.

Employment History:

- | | |
|--|---------------------|
| Owner/Operator, Education Compliance Services | July 2016- Present |
| Operations Director/CFO, Arizona Charter Solutions | June 2016-Nov. 2020 |
| <ul style="list-style-type: none">● All Budget and Finance reporting● State and Federal Compliance● Oversight of Annual Audit, 990, Budgets● Provide oversight to campus business and legal matters● Oversee IT Department● Oversee HR Department● Oversee Facility Department | |
| Business Manager, Arizona Charter Solutions | July 2011-June 2016 |
| <ul style="list-style-type: none">● Creating and implementing fiscal systems● Oversight of campus Business Specialists● Grants Management● Annual Audit preparation● Creating budgets, AFR's, 990's, etc● Work with Operations Director to create sound fiscal policy● Oversee IT Department | |



Colearn Academy Utah

- Oversee Facilities Department

Operations Director Assistant, Arizona Charter Solutions May 2006-July 2011

- Responsible for Student Information System database
- Help with fiscal needs of the school (Monthly reports, etc)
- Employee Handbook development
- Day-to-Day administrative duties
- State Compliance reporting

RELATED EXPERIENCE

- Appointed to the Arizona Title I Committee of Practitioners 2023-26 Term
- Board Member, Grace City Christian Church, Mesa, AZ
- Financial Resource Team, Hope Covenant Church, Chandler, AZ
- Advancing Gilbert Education Leadership Team, Gilbert, AZ
- Arizona Charter School Association conference presenter
- National Charter School Association conference presenter
- Arizona Charter School Association Business Person of the Year 2014

Education History:

Purdue University

August 1978-May 1980

Various Professional Development Credits:

- Arizona School Board Association Law Conference 2016
- Collaborative Culture & Higher Student Expectations 2014
- A Guide to Functional Expenses, Heinfeld, Meech & Co. P.C 2015
- Leading Change Conference – Multiple years between 2010-2023
- Academic Framework and Sufficient Progress Workshop 2013
- 5 CEU credits 2011 Arizona Charter School Association Business Conference
- Charter School Financial Management Institute Completion 2010

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A handwritten signature in black ink, appearing to be "M. J. [unclear]".

Applicant's Signature



Appendix B: Articles of Incorporation

Colearn Academy Utah [Proposed Articles of Incorporation](#)

Colearn Academy Utah [Board Approved Articles of Incorporation](#)



Appendix C: Governing Board Bylaws

[Colearn Academy Utah Bylaws](#), approved June 29, 2023

Appendix D: Minutes from Governing Board meetings



Colearn Utah

Governing Board Minutes

June 29, 2023

2:45-2:50 pm via [Telephone](#)

All items on the Agenda are open for discussion and possible action, including reports and action items. The Board reserves the right to go into Executive Session on any item listed below.

CALL TO ORDER at 2:48 pm

ROLL CALL: Kim Phillips, Becki Krueger, Amber Robinson

Not Present: Teri-Lisa Stagg

1. Review and approve the Articles of Incorporation for Colearn Utah

Becki Krueger presented the Articles of Incorporation. These articles will be uploaded to the Utah Department of Commerce.

Becki Krueger motions to accept the Articles of Incorporation as presented. Amber Robinson seconds the motion.

Roll Call vote: Becki Krueger: Aye, Amber Robinson: Aye, Kim Phillips: Aye

Motion approved 3-0

2. Review and adoption of the Corporate Bylaws for Colearn Utah

Becki Krueger presented the Colearn Utah Bylaws.

Kim Phillips motions to accept the Bylaws as presented. Amber Robinson seconds the motion.

Roll Call vote: Becki Krueger: Aye, Amber Robinson: Aye, Kim Phillips: Aye

Motion approved 3-0

3. Adjournment at 2:51 pm