



New Satellite School or Large Expansion Application

Charter School Name:

Lincoln Academy

Charter School Director:

Jake Hunt

The request is for: (select one)

<input checked="" type="checkbox"/> Satellite School Grade levels currently served: <u>K-9</u> Grade levels requested for satellite school: <u>K-12</u> Current max enrollment: <u>910</u> Max enrollment requested for satellite school: <u>700</u> Current LEA location(s) (city and district): <u>Pleasant Grove, Alpine School District</u> Requested location for satellite school (city and district): <u>Pleasant Grove, Highland or American Fork, Alpine School District</u>	<input type="checkbox"/> Large Expansion Grade levels currently served: _____ Grade levels requested for satellite school: _____ Current max enrollment: _____ Max enrollment requested for satellite school: _____
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I certify that this request is being made by the governing board and has been discussed in an open and public meeting.

[Signature] 11/14/23
 Board Chair/ Date

[Signature] 11/14/23
 Director/ Date

Please select one response per requirement:

- Yes No 1. The charter school complies with the requirements of federal and state laws, regulations, and Board rule.
- Yes No 2. The charter school meets the academic and other standards and requirements of the charter school authorizer.
- Yes No 3. The charter school is in good standing with the SCSB.
- Yes No 4. The charter LEA, as a whole, qualifies as high performing under the SCSB's approved definition of high performing.
- Yes No 5. The school complies with all public school legal obligations.
- Yes No 6. The charter school has no outstanding corrective action that has not yet been resolved by the completion of a corrective action plan.
- Yes No 7. The charter school has a hiring plan in place to ensure there are adequate qualified administrators and staff to meet the needs of the proposed student population.

Required Attachments:

1. Provide a 1-page explanation of the justified need for the requested new satellite school or large expansion.
2. Provide a 1-page overview describing how the new satellite school or large expansion will provide educational services consistent with state law and Board rule.
3. Provide a 1-2 page plan for the new satellite school or large expansion to administer and have the capacity to carry out statewide assessments, including proctoring statewide assessments.
4. Provide a 1-3 page detailed description of the evidence-based instruction for special populations that will be provided to students as required by federal law.
5. Provide a 1-3 page market analysis. Per R277-552(2), market analysis should be a qualitative and quantitative analysis of the educational market near a proposed charter school, including:
 - (a) the school's target demographics;
 - (b) population and development trends in the area;
 - (c) nearby competing public schools;
 - (d) the proposed school's forecasts, along with supporting data; and
 - (e) any risks, barriers, or regulations that may impact a proposed school's success.
6. Provide a 2-4 page response addressing if the charter school is operationally successful, taking into consideration at least two years of data for every school under the charter agreement. Per R277-552(7), a charter school is considered to be operationally successful if:
 - (i) For each of the schools under the charter agreement, the charter school meets the following criteria:
 - (A) for a school with 350 or fewer students enrolled in the school, at least a 120% debt coverage ratio* for each of the three years before the request for a satellite;
 - (B) for a school with between 351 and 499 students enrolled in the school, at least 115% debt coverage ratio* for each of the three years before the request for a satellite;
 - (C) for a school with between 500 and 750 students enrolled in the school, at least a 110% debt coverage ratio* for each of the three years before the request for a satellite;
 - (D) for a school with more than 750 students enrolled in the school, at least a 105% debt coverage ratio* for each of the three years before the request for a satellite;
 - (ii) the charter school is financially viable, as evidenced by the charter school's financial records, including the charter school's:
 - (A) most recent annual financial report (AFR);
 - (B) annual program report (APR); and
 - (C) audited financial statements;
 - (iii) the charter school has maintained a net lease-adjusted debt burden ratio of under 25% for each of the last three years; and
 - (iv) the charter school's financial statements report revenues in excess of expenditures for at least three of the last four years;
 - (v) the charter school is meeting the terms of its charter agreement;
 - (vi) the charter school has maintained for each of the last three years:
 - (A) a re-enrollment rate of at least 80%;
 - (B) a waitlist of at least 40% of its annual enrollment; or
 - (C) there is a demonstrated demand for the proposed satellite or large expansion, taking into consideration the market analysis.

**For purposes of this section "debt coverage ratio" means: a debt coverage ratio calculated using (revenue - expenditures + interest cost + depreciation) divided by annual debt service; or if the charter school's facilities are leased and not owned, a debt coverage ratio calculated using (revenue - expenditures + facility lease payment + real property taxes + depreciation) divided by annual debt service.*

SECTION 1

Lincoln Academy's expansion is supported by several compelling justifications as outlined below:

1. **Overwhelming Waiting List**: Over the past few years, Lincoln Academy has consistently maintained a substantial waiting list. In the 2023-24 academic year, the waitlist reached 552 students, following 370 students in the previous year. Similar trends have been reflected in our lottery application. Each year our lottery opens on November 1st. On November 9, 2023 we have already received 193 applications compared to 160 in 2022 and 70 in 2021 on the same date. This remarkable demand underscores the trust parents have in our school's educational excellence and holistic student development.
2. **Parental Demand for Alternatives**: A considerable number of parents within our community consistently express the desire for high school options that align closely with the Lincoln Academy experience. Addressing this demand is crucial, given the palpable interest in our unique educational approach.
3. **Lack of Similar-Sized Options**: High schools in our immediate area are predominantly large comprehensive institutions, with student populations ranging from 2100 to 2600. These schools, while offering a rich social experience, differ significantly in size from Lincoln Academy. This lack of similarly sized alternatives poses challenges for our students as they transition to larger institutions.
4. **Failed Local Bond Effort**: The recent failure of the local school district's bond effort highlights the financial constraints faced by the school district serving our community. The district closed an elementary school in our area—partially as a result of the failed bond. It is noteworthy that despite these challenges, our area is experiencing steady growth in construction and community development. In the 2022-2023 academic year, there were 9621 students enrolled in four high schools. That means that no students could stay in their geographic area and have a small high school experience. In such circumstances, expanding Lincoln Academy offers a sustainable and cost-effective solution to meet both growth and the demand for diverse educational opportunities.
5. **Focus on Career Readiness**: An exciting opportunity exists for high school graduates to strengthen their career readiness. Several local schools primarily emphasize creating a vibrant social environment. We have keenly observed a rising potential to elevate academic rigor and concurrently provide students with opportunities to cultivate essential career-ready skills. The proposed expansion will play a pivotal role in enhancing our offerings, enabling students to acquire practical skills and experiences vital for their future careers.
6. **Sufficient Enrollment from Current Student Body**: Importantly, our current enrollment at Lincoln Academy is sufficient to populate the new high school without

requiring significant transfers from local schools. This approach preserves the existing educational landscape while fulfilling the community's needs.

It is worth noting that other justifications, such as Lincoln Academy's solid financial performance, exceptional academic results, high retention rates, parental satisfaction, and consistent school leadership, are strong considerations, which will be elaborated on in subsequent sections of the application.

Section 2

Because Lincoln Academy has been providing services for the Northern portion of Utah County since 2005, we have clearly established policies and protocols to meet both state law and local governing board policy. The secondary principal at Lincoln Academy has served as a high school principal in another district here in Utah and is also fully aware of state law and regulation regarding graduation requirements as well as current regulations surrounding changes in state statute related to curriculum selection and delivery. All local governing board policies are updated yearly at the close of the current legislative session. Additionally, members of administration also attend the yearly SPED Law Conference in the state of Utah to ensure that we are compliant with the most recent changes in both IDEA and Title IX.

Each year, employees are required to complete trainings with deliverables in the following areas: testing certification, state testing compliance, child nutrition and civil rights, state ethics training, employee conflict resolution training, Title IX training, and sexual harassment training, as well as a full training on the sections of the employee handbook. In addition to these trainings, employees undergo face-to-face bullying training, state sensitive materials policy training, and SPED training to ensure full compliance for students with IEPs and 504s.

Employees of Lincoln Academy actively participate on committees at the state level in many areas such as ELA data review, ELA item writing, ELA standards alignment, math standards alignment and math item writing for both RISE and UA+ testing formats in order to ensure that state standards are being administered to the fullest extent possible. A further indicator of Lincoln's commitment to adhering to state policy comes from the state One Percent Alternate Assessment report. Lincoln actively explains to parents and students why we encourage participation in end-of-year state assessments and how we use the data from year to year to evaluate student progress. Lincoln has not exceeded the 1% threshold for opt-outs since 2017 which shows our commitment to administering state standards and measuring that growth.

In addition to state statute, Lincoln endeavors to be wholly connected to and supportive of state initiatives. At the K-9 level, we have already implemented many of the areas identified in the state's Portrait of a Graduate document. Our vision statement of allowing students to SOAR addresses the areas of Service, Overcoming Obstacles, Academic Achievement, and Respect for self and others. In addition, Lincoln made the move to standards-based instruction and grading in 2018, and we have seen great acceptance of understanding among parents and staff. We are looking forward to taking a more competency-based approach in this new high school concept so that students can achieve their greatest potential.

Section 3

As an extension of an already existing campus, Lincoln has an established history of administering all required statewide assessments with the exception of the ACT. Both Mr. Hunt and Mrs. Ungerman attend or view the monthly assessment director's meetings, and both are aware of the testing requirements to add the ACT test to our required battery. We currently run two sessions of ACT Boot Camp to prepare our ninth graders to take their first ACT during their tenth grade year of school. Additionally, we know that we will be adding our civics exam for seniors.

Lincoln currently administers RISE benchmarks, class period interim assessments, and the full year-end summative assessments. All teachers are inserviced in the training protocols surrounding each different administration of RISE, and pursuant to our parent registration records, we keep an updated list of students who have either opted out of testing or have specific accommodations regarding state testing.

9th graders currently take the year-end Utah Aspire Plus assessment. All 9th grade teachers are inserviced in the delivery protocols for the AU+, and we keep clear lists of students who are opted out, have extended time, or have alternate location or other testing accommodations relative to that specific test administration. Our technology department stays abreast of all updates relative to both RISE and the UA+, and administration regularly checks Aspire records against UTREX to make sure that class codes are assigned properly to generate appropriate tests.

ELL populations are screened and identified relative to Title III regulations. All WIDA testing is administered through fully trained testers and records are kept as per state regulation. Students qualifying for DLM testing are also tested by fully qualified certified staff, and all required accommodations are met relative to student IEP records.

All certified teaching staff are required to update certification on state testing protocols yearly. At Lincoln, that renewal happens in August before the school year begins. Lincoln also completes and submits state testing plans yearly to the state which also outline staff training windows. Lincoln Academy is also a one-to-one device school. We have full capacity to administer all state testing online.

In addition to the state required testing protocols, we would also like to add an optional participation in ASVAB testing to encourage possible careers in the military.

SECTION 4

Lincoln maintains a fully-functioning Special Education and Special Services program. Through our Multi-tiered Systems of Support team, we conduct data studies, intervention cycles, and observations to carry out child find processes at the secondary level. If students are identified as needing support, we construct an MTSS intervention plan with accommodations. If intervention cycles are ineffective, students are referred for evaluation relative to qualifying diagnoses and Federal law.

For our already identified students, Lincoln provides a number of different services and strategies. ELL students are served through the WIDA processes set forward by the state of Utah and in compliance with state statute. All 504 students are instructed relative to their accommodations and in relation to accepted UDL standards. Lincoln teachers are inserviced regularly in UDL practices which benefit all student populations including small group instruction, multiple representations for assessment, differentiated instruction, competency-based instruction and grading principals, station rotation activities, and various tech applications. By implementing UDL principles, educators can provide multiple means of representation, expression, and engagement, thereby addressing the diverse needs of all learners, including those with special needs.

In compliance with IDEA, all students with IEPs receive services relative to the process set forward by the Federal government. A team of parents, teachers, specialists, administrators, and the student meet to evaluate screening data and formulate a plan to meet student specific needs. At Lincoln, all students are educated in the least restrictive environment. Even our most severe students attend elective classes with their peers. Inclusion is a long-standing practice that benefits all students. Special education students are fully immersed in grade-level instruction while having the benefits of being able to model peer-appropriate behavior. Most SPED students are accompanied by special education paraprofessionals who assist teachers in providing accommodations and in guiding appropriate modifications to course level work. Students also participate in transition plans which begin with their 1st presentation to parents in their 14th year. Teachers and the school counselor work closely with parents to craft 5 year educational plans relative to those transition goals in order to help students with IEPs be functional and employable in the postsecondary setting. Inclusion is paramount in the services that we provide, and secondary teachers are routinely inserviced in best practices surrounding inclusion.

Lincoln also employs assistive technology as needed. Speech to text and text to speech apps and programs are employed for students with disabilities that require special help. Apps are used for students with autism who require visual schedules, choice menus, break menus, or picture exchange communication systems.

In addition to our school counseling services, this year Lincoln has hired a full-time BCBA with several behavioral support personnel. Our BCBA oversees all facets of behavioral support including FBAs and BIPs as appropriate. All levels of service

including teachers, TAs, paraprofessionals, office staff, cafeteria staff, and custodial staff are being inserviced in behavioral supports to help our special needs populations be able to integrate fully into the Lincoln environment. In addition to classroom provided instruction from the BCBA, our SEL committee structures and provides SEL weekly lessons in the classroom to aide students with peer-to-peer communication and self-regulation strategies. Since the instruction is received by all students, our special population students don't feel singled out. For our students with autism who struggle socially, we have instituted a social skills class where strategies for interpersonal communication are explicitly taught.

All instruction related to special populations will also be guided specifically through the categories delineated in the Utah Portrait of a Graduate. Lincoln focuses heavily on the areas of academic growth, service, digital literacy, communication, resilience, lifelong learning, and personal growth through the school's mission and vision statements.

SECTION 5

In our market analysis for the proposed expansion of Lincoln Academy, we consider various factors, both qualitative and quantitative, to provide a comprehensive view of the educational landscape in our vicinity, in accordance with R277-552(2). Our analysis encompasses the school's target demographics, population and development trends, competing public schools, forecasts with supporting data, and potential risks and regulations.

Target Demographics: The primary target population for Lincoln Academy's expansion consists of students currently attending Lincoln Academy, as well as those who have applied or are on the waitlist. Most of these families reside in American Fork, Pleasant Grove, Cedar Hills, and Highland. We also receive applications from families in Lehi, Lindon, Vineyard, Saratoga Springs, Orem, and Provo.

Increasing Interest: Over the past three years, there has been a noticeable surge in community interest in attending Lincoln Academy. This increase is reflected in the growing number of inquiries, applications to our lottery, and the number of individuals attending school tours. Our parents have been asking for years for Lincoln to build a high school. We began exploring this option in the fall of 2019. COVID put our plan on hold and we are now revisiting this opportunity. In November of 2023 we surveyed our parents to determine interest. We received almost 400 responses which we estimate to be about 80% of our families. Our families indicated that they would be very supportive of a high school with 84% of them indicating they would enroll their children at Lincoln Academy for High School.

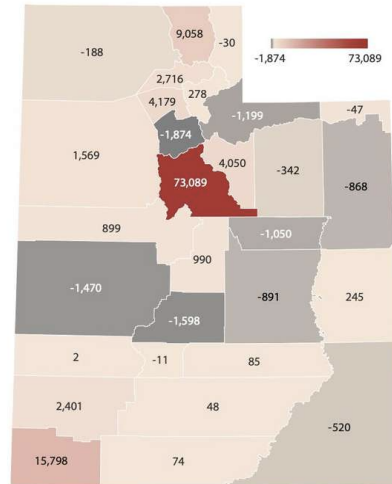
Population and Development Trends: According to the Census Bureau, the population estimates for our school community as of July 1, 2022, were as follows:

	Alpine	Cedar Hills	Highland	American Fork	Pleasant Grove	Total
Population Estimates, July 1, 2022, (V2022)	10,304	9,956	19,902	37,268	37,630	115,060
Population estimates base, April 1, 2020, (V2022)	10,262	10,023	19,357	33,365	37,722	110,729
Population, percent change - April 1, 2020 (estimates base) to July 1, 2022, (V2022)	0.40%	-0.70%	2.80%	11.70%	-0.20%	3.91%
Persons under 5	484	727	1,115	3,280	3,123	8,728
Persons under 5 years, percent	4.70%	7.30%	5.60%	8.80%	8.30%	7.59%
Persons under 18	3328	3933	7921	11590	11741	38513
Persons under 18 years, percent	32.30%	39.50%	39.80%	31.10%	31.20%	33.47%

It is noteworthy that the population in the area has experienced steady growth. Additionally, a recent report from the University of Utah Kem C. Gardner Policy Institute indicates that student

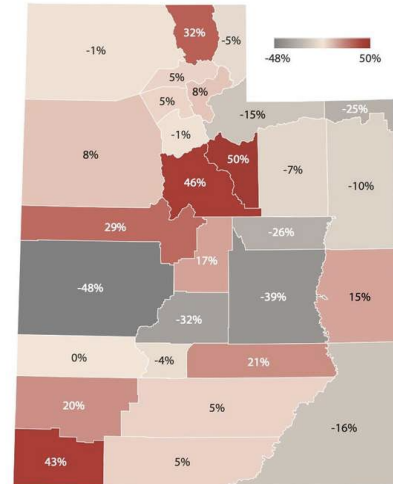
population growth in Utah County is expected to be one of the fastest in the state. (See image on following page)

Figure 10: Absolute Change in School-Age Population by County, 2020 to 2060



Note: School-age reflects population ages 5 to 17.
Source: Kem C. Gardner Policy Institute State and County Projections 2020-2060

Figure 11: Percent Change in School-Age Population by County, 2020 to 2060



Note: School-age reflects population ages 5 to 17.
Source: Kem C. Gardner Policy Institute State and County Projections 2020-2060

Competition and Nearby Schools: The Northeastern area of Utah County, which includes Pleasant Grove, Highland, American Fork, Alpine, Cedar Hills, and Northeast Lehi, currently hosts four comprehensive high schools and six junior highs within the Alpine School District. Population numbers for the four high schools have either remained stable or increased from 2020 to 2023.

There are also six charter schools (John Hancock, Odyssey, Canyon Grove, Mountainville, Renaissance, and Ignite Entrepreneurship Academy) in the vicinity, none of which offer high school grade levels. Lincoln Academy aims to establish its own high school and expand its K-6 programs to facilitate this process. The proposed expansion rate includes a phased approach to accommodate growing student numbers.

Enrollment and Financial Model Projections: Lincoln desires to open its high school and grow its own students. In the expansion process it will also increase the number of students in K-6 to help facilitate this process. Lincoln’s proposed expansion rate is as follows:

	Current	Fall 2026	Fall 2027	Fall 2028	Fall 2029
Kindergarten	75	125	125	125	125
1st Grade	76	125	125	125	125
2nd Grade	77	125	125	125	125
3rd Grade	79	125	125	125	125

4th Grade	81	125	125	125	125
5th Grade	82	125	125	125	125
6th Grade	109	125	125	125	125
7th Grade	119	125	125	125	125
8th Grade	115	115	120	125	125
9th Grade	99	100	110	115	120
10th Grade	0	90	100	105	115
11th Grade	0	0	85	95	110
12th Grade	0	0	0	80	90

The school desires to charter for 1600 students to allow some flexibility in grade levels, especially on the secondary level to add students in grade levels when interests are higher. Additionally, we have engaged LRB Public Finance Advisors to develop a financial model, considering various construction and land acquisition companies' inputs. This model projects debt service coverage based on the anticipated costs of expansion and enrollment.

2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
1.77	1.76	1.74	1.59	1.56	1.70	1.04*	1.48	1.53	1.40	1.52	1.53	1.74

*The current budget indicates a temporary decrease in debt service coverage due to one-time costs for a remodeled playground area, facility costs, and IT infrastructure additions. Lincoln Academy is actively seeking grants and partnerships with E-Rate to mitigate these costs and enhance debt service coverage levels. Lincoln may also choose to not initiate some of these projects this year to increase its debt service coverage.

Risk Mitigation: There are, however, inherent risks associated with expansion, including land acquisition challenges, fluctuations in construction and financing costs, and uncertainties in student enrollment numbers, particularly at the high school level. To manage these risks, the board is open to the possibility of a phased construction approach or delaying expansion until it becomes financially feasible.

In conclusion, our market analysis paints a positive picture of the potential for Lincoln Academy's expansion. The growing population, increasing community interest, and effective financial planning indicate a strong foundation for the proposed expansion. While there are inherent risks, Lincoln Academy is committed to managing them effectively and providing our community with an enriched educational experience.

SECTION 6

The Director of Lincoln Academy, Jake Hunt, and the Director of Finance and Compliance, Marie Eads, have collectively overseen the institution's financial and academic affairs for the past 16 years, establishing a commendable operational record. The pertinent details, as requested in this application, are outlined below:

Financial Stability

Lincoln Academy has consistently maintained a healthy debt coverage ratio over the last three fiscal years: FY23 at 170%, FY22 at 156%, and FY21 at 159%. The most recent annual financial report, program report, and audited financial statements, all appended to this application, substantiate the school's financial health, highlighting robust internal controls and sound financial practices. Lincoln has maintained and continued to grow its days of cash on hand. For FY 23 it had 199, FY 22 181, and FY 21 181.

Debt Management

The net lease-adjusted debt burden ratio for the past three fiscal years reflects prudent financial management: FY23 at 10%, FY22 at 10%, and FY23 at 11%. The School has efficiently managed its debt and budgets to effectively put as many dollars into the classroom.

Financial Overview

Examining the financial statements for the past three years (FY23, FY22, FY21), we observe revenues, expenses, and the net difference:

FY23

- Revenues: \$9,706,146
- Expenses: \$9,075,478
- Net Difference: \$630,668

FY22

- Revenues: \$9,107,576
- Expenses: \$8,609,401
- Net Difference: \$498,175

FY21

- Revenues: \$8,311,660
- Expenses: \$7,783,067
- Net Difference: \$528,593

Charter Agreement Compliance

The charter agreement, referencing 2006-2007 enrollment and student performance and signed in 2009, binds Lincoln Academy to compliance with laws, enrollment trends, financial warnings, services to children with special needs, reporting, financial audits, insurance provision, adherence to procurement expectations, hiring licensed professionals, student discipline and

instruction, and charter termination. Presently, the institution is fully compliant, submitting requisite reports, maintaining robust enrollment, conducting annual audits, and meeting all specified compliance requirements.

The school administration and board of trustees express openness to reassessing the existing agreement, considering the potential benefits of signing a future amended agreement.

Enrollment and Retention Trends

Stable and slightly increasing enrollment trends demonstrate notable retention rates and consistent demand. Furthermore, waitlists of 30-50% of enrollment demonstrate continued demand of the school.

FY23

- Retention Rate: 89.3%
- Waitlist Numbers: 552

FY22

- Retention Rate: 87.5%
- Waitlist Numbers: 370

FY21

- Retention Rate: 84.3%
- Waitlist Numbers: 325

Beyond these figures, the market analysis, as detailed in Section 5, emphasizes the community's inclination towards a smaller high school experience, concurrent with the growing student and population numbers in the area, supported by a strong demand from the current parent population for a high school expansion.

In conclusion, Lincoln Academy's financial and academic track record position our institution favorably for the proposed expansion, reflecting a commitment to fiscal responsibility, compliance, and sustained growth.