



Lakeview Academy Board of Trustees Meeting
February 12, 2026 at 7:00 p.m.
527 W 400 N Saratoga Springs, Utah

Lakeview Academy Mission:

Develop Capable, Confident, and Contributing members of society through learning experiences that foster growth, creativity, and character development.

Lakeview Academy's Board of Trustees Role:

The purpose of the board, on behalf of the citizens of Utah, is to see to it that Lakeview Academy (1) achieves what it should according to the Lakeview Academy Charter and state laws and (2) avoids unacceptable actions and situations.

- 1) Welcome and Roll Call
- 2) Pledge of Allegiance
- 3) Professional Development
 - a) Board Retreat
- 4) Reports
 - a) Director's Report
 - i) MOY Math Report
 - ii) MOY Reading Report
 - b) Board Member's Reports
 - i) CAP report and assignments
 - ii) Board Election Process
 - d) Board Committee Reports
 - i) Policy Committee
 - ii) Expansion Committee
 - (1) Financing Options
 - iii) Financial Audit Committee
 - e) December Financial & Accounting Reports
 - i) Financial Scoreboard
 - ii) Monthly Financial Metrics
 - iii) Balance Sheet Report
 - iv) Income Statement Report
 - v) Check Register Report
 - vi) P-Card Purchase Reports
 - vii) Q2 Program Reports
- 5) Public Comment: The public may address any issue unrelated to items already on the agenda. Participants are asked to state their names for the official minutes, and please be concise. If you cannot attend the meeting, email your comments to bot@lakeview-academy.com to be included in the minutes. Please submit your

comments no later than two hours prior to the start of the meeting.

6) Public Hearing

- a) LVA Club & Athletics Fees & Spending Plan 2026-2027

7) Consent Agenda

- a) Minutes January 8, 2026

8) Action Items

- a) Firearm Safety Curriculum for Middle School
- b) Financing for Expansion
- c) School Land Trust Final Report 2024-2025

9) Closed Session

- a) A motion to enter a closed session per Utah Code 52-4-205 to discuss litigation matters, acquisition of real property, or authorized personnel issues (all motions, except the motion to exit the closed session, will be made in an open meeting).
- b) Return to Open Meeting
- c) Action may be taken regarding litigation matters, acquisition of real property, or authorized personnel issues.

10) Adjourn

MONTHLY DIRECTORS REPORT

1. Please list activities and programs completed this month that support:

a) Language Arts and Mathematics Ends Policy

MOY assessments will be completed by the end of this week and that data can be shared in February. We were recognized by the State for our percentage of students in 3rd grade reading on grade level at the end of last year and that notice was emailed to the board as well. Each PLC is working on the goals they have for the year with regards to the ends policy and goals set in our application for State funds.

b) Science, Arts, and Technology Ends policy

The CAP includes information regarding events that meet this policy. We held our Meet the Middle School event where we share with our current 6th grade students what it will be like in our Middle School program. They get an opportunity to do a science lab, explore musical instruments, participate in a CTE project and other elective activities. 4th grade students performed their Utah musical for 3rd grade and families. We have auditions and casting for the spring musical this month.

c) Parent Satisfaction Ends Policy

2026-2027 Lottery (as of 1/30/2026)

Grade	Lakeview Academy			
	Total	General WL	Sib 1WL	Faculty WL
K	213	131	75	7
1	30	27	3	0
2	35	34	1	0
3	33	33	0	0
4	31	27	4	0
5	40	36	4	0
6	25	22	3	0
7	55	44	9	2
8	18	18	0	0
9	8	8	0	0
Totals:	488	380	99	9

2. Please provide information and updates from the following departments:

- a) **Business/finance/IT** – All reports are being completed on time. We are preparing the IT in the north addition so it will be working properly when ready to occupy. We increased our efforts on IT tickets and have seen a faster turnaround for when a teacher submits a work ticket and when that ticket is resolved.
- b) **Special Education, Business reports, Accreditation** –No new updates at this time.
- c) **Staff updates** – We are beginning our recruiting process and have posted open positions on teachers-teachers.com. We are registering for Job fairs at a few Universities to help us find the best teachers for LVA.

Toot our Horn!

- 1. We ROAR the 4th grade students and staff for an excellent Utah musical. This performance has become a core memory for our students as they recognize some great moments in Utah history and sing together.
- 2. ROAR to all who participated and to our winner of the Spelling Bee this year. We are always impressed with their courage and skills.
- 3. ROAR to 1st grade who
- 4. ROAR to LVA expansion committee and school for the progress on the expansion. We are nearing completion of the North and East wings.
- 5. ROAR to LVA as we host open houses over the month. They are well attended events that help strengthen our lottery program and improve our efforts to fill empty sits for next school year.

2025-26 BOY Math Report

Elementary 2020-2026			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
K	2020-21	Acadience												
	2021-22	Acadience												
	2022-23	Acadience												
	2023-24	Acadience												
	2024-25	Acadience	48%	23%	20%	9%	46%	17%	24%	13%	39%	20%	24%	17%
	2025-26	IXL	9%	72%	19%	0%	12%	65%	23%	0%				
		Acadience	43%	21%	19%	17%	50%	14%	20%	16%				
1st	2020-21	Star	69%	16%	11%	3%	87%	4%	7%	1%	92%	6%	0%	2%
		Acadience												
	2021-22	Star	71%	13%	13%	3%	93%	4%	3%	0%	97%	2%	1%	0%
		Acadience	42%	8%	33%	17%	35%	12%	24%	29%	46%	11%	25%	18%
	2022-23	Star	67%	17%	12%	5%	92%	5%	3%	0%	89%	10%	1%	0%
		Acadience	49%	7%	18%	26%	58%	6%	23%	13%	61%	15%	13%	11%
	2023-24	Star	60%	14%	11%	16%	88%	6%	3%	3%	86%	7%	5%	2%
		Acadience	34%	11%	24%	31%	54%	12%	12%	23%	56%	10%	14%	19%
	2024-25	Star												
		Acadience	31%	12%	23%	34%	53%	10%	19%	17%	57%	7%	18%	18%
	2025-26	IXL	24%	48%	25%	3%	23%	53%	20%	4%				
		Acadience	37%	12%	32%	19%	48%	7%	23%	23%				
2nd	2020-21	Star	57%	14%	18%	10%	67%	14%	11%	8%	70%	14%	7%	9%
		Acadience												
	2021-22	Star	55%	20%	19%	7%	79%	7%	6%	9%	76%	9%	9%	6%
		Acadience	56%	14%	13%	16%	39%	19%	21%	20%	26%	21%	27%	25%
	2022-23	Star	76%	10%	10%	4%	87%	8%	4%	2%	82%	6%	9%	3%
		Acadience	49%	26%	17%	9%	43%	17%	25%	14%	45%	19%	23%	13%
	2023-24	Star	76%	9%	10%	6%	85%	5%	9%	2%	83%	6%	6%	5%
		Acadience	63%	11%	12%	15%	68%	9%	9%	14%	59%	15%	10%	17%
	2024-25	Star												
		Acadience	52%	17%	19%	13%	41%	19%	20%	21%	40%	23%	13%	24%
	2025-26	IXL	18%	52%	25%	6%	16%	65%	18%	2%				
		Acadience	47%	12%	16%	24%	47%	14%	21%	18%				
3rd	2020-21	Star	57%	14%	14%	15%	72%	11%	6%	11%	66%	9%	12%	16%
		Acadience												
	2021-22	Star	66%	14%	10%	10%	84%	5%	9%	2%	74%	10%	11%	4%
		Acadience	50%	12%	19%	19%	50%	15%	18%	17%	45%	16%	25%	14%
	2022-23	Star	72%	8%	10%	11%	84%	7%	3%	6%	79%	6%	8%	7%
		Acadience	34%	12%	23%	31%	63%	6%	13%	18%	54%	20%	5%	21%
	2023-24	Star	77%	6%	11%	7%	81%	7%	8%	5%	75%	8%	11%	6%
		Acadience	42%	10%	22%	27%	57%	10%	17%	16%	52%	11%	19%	18%
	2024-25	Star												
		Acadience	51%	6%	23%	20%	46%	11%	22%	21%	60%	13%	12%	15%
	2025-26	IXL	8%	52%	29%	10%	11%	45%	35%	10%				
		Acadience	36%	8%	22%	34%	40%	16%	13%	32%				
4th	2020-21	Star	65%	14%	16%	4%	68%	10%	17%	5%	75%	11%	6%	8%
	2021-22	Star	60%	14%	13%	12%	77%	4%	12%	8%	77%	8%	6%	10%
	2022-23	Star	70%	10%	11%	9%	79%	8%	11%	3%	84%	6%	5%	5%
	2023-24	Star	74%	7%	9%	9%	75%	8%	11%	6%	74%	8%	9%	10%
	2024-25	Star	70%	13%	12%	6%	74%	13%	8%	5%	75%	12%	7%	6%
	2025-26	IXL	5%	48%	36%	12%	6%	42%	42%	10%				
5th	2020-21	Star	62%	14%	11%	12%	70%	12%	12%	5%	78%	9%	8%	5%
	2021-22	Star	67%	11%	13%	10%	79%	9%	5%	7%	81%	7%	8%	5%
	2022-23	Star	66%	14%	12%	9%	75%	10%	5%	10%	76%	6%	5%	13%
	2023-24	Star	76%	9%	13%	2%	82%	6%	7%	5%	73%	11%	6%	9%
	2024-25	Star	75%	9%	11%	5%	76%	13%	10%	2%	74%	15%	9%	2%
	2025-26	IXL	6%	22%	49%	23%	6%	32%	31%	31%				
6th	2020-21	Star	46%	25%	21%	8%	64%	19%	11%	5%	64%	18%	14%	4%
	2021-22	Star	69%	12%	10%	10%	79%	10%	6%	5%	81%	7%	6%	6%
	2022-23	Star	68%	16%	9%	8%	71%	9%	15%	6%	81%	4%	8%	7%
	2023-24	Star	66%	12%	9%	13%	69%	11%	10%	10%	73%	7%	9%	11%
	2024-25	Star	80%	8%	10%	2%	77%	14%	6%	3%	80%	13%	7%	0%
	2025-26	IXL	13%	23%	25%	39%	10%	21%	25%	43%				

2025-26 BOY Math Report

Total Elementary			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
K-6	2020-21	Star Acadience	59%	16%	15%	9%	71%	12%	11%	6%	74%	11%	8%	7%
K-6	2021-22	Star Acadience	65%	14%	13%	9%	82%	7%	7%	5%	81%	7%	7%	5%
			49%	11%	22%	17%	41%	15%	21%	22%	39%	16%	26%	19%
K-6	2022-23	Star Acadience	70%	13%	11%	8%	81%	8%	7%	5%	82%	6%	6%	6%
			44%	15%	19%	22%	55%	10%	20%	15%	53%	18%	14%	15%
K-6	2023-24	Star Acadience	70%	10%	11%	10%	80%	8%	8%	6%	79%	7%	8%	6%
			46%	11%	19%	24%	60%	10%	13%	18%	56%	12%	14%	18%
K-6	2024-25	Star Acadience	75%	10%	11%	4%	75%	13%	8%	3%	76%	13%	8%	2%
			46%	14%	21%	19%	47%	14%	21%	18%	49%	16%	17%	19%
K-6	2025-26	IXL Acadience	12%	45%	30%	13%	12%	46%	28%	14%				
			41%	13%	22%	23%	46%	13%	19%	22%				

Middle School			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
7th	2020-21	Star	69%	12%	14%	6%	82%	9%	6%	4%	81%	4%	7%	8%
	2021-22	Star	67%	18%	11%	4%	72%	10%	12%	5%	77%	12%	7%	4%
	2022-23	Star	69%	13%	12%	6%	61%	13%	16%	9%	76%	13%	6%	5%
	2023-24	Star	68%	13%	11%	8%	66%	10%	12%	12%	68%	15%	7%	10%
	2024-25	Star	75%	4%	15%	5%	72%	14%	6%	7%	69%	8%	14%	8%
	2025-26	IXL	6%	30%	25%	38%	7%	21%	29%	42%				
8th	2020-21	Star	60%	14%	19%	7%	66%	18%	12%	4%	66%	13%	10%	11%
	2021-22	Star	57%	12%	17%	13%	62%	12%	16%	10%	65%	13%	19%	4%
	2022-23	Star	42%	23%	26%	9%	46%	10%	31%	13%	39%	17%	16%	29%
	2023-24	Star	63%	13%	14%	9%	59%	15%	17%	10%	61%	15%	11%	14%
	2024-25	Star	69%	17%	9%	5%	74%	11%	9%	5%	69%	14%	7%	10%
	2025-26	IXL	6%	21%	26%	48%	8%	13%	21%	58%				
9th	2020-21	Star	67%	17%	14%	2%	79%	13%	5%	4%	86%	7%	3%	3%
	2021-22	Star	80%	10%	8%	2%	86%	7%	5%	2%	89%	5%	2%	4%
	2022-23	Star	80%	6%	13%	1%	78%	8%	11%	3%	81%	6%	10%	2%
	2023-24	Star	68%	17%	10%	5%	73%	9%	9%	9%	75%	7%	15%	4%
	2024-25	Star	81%	11%	4%	4%	77%	8%	10%	4%	76%	10%	12%	1%
	2025-26	IXL	1%	15%	22%	62%	1%	11%	20%	67%				

Total Middle School			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
7-9	2020-21	Star	65%	14%	16%	5%	76%	13%	8%	4%	78%	8%	7%	7%
7-9	2021-22	Star	68%	13%	12%	6%	73%	10%	11%	6%	77%	10%	9%	4%
7-9	2022-23	Star	64%	14%	17%	5%	62%	10%	19%	8%	65%	12%	11%	12%
7-9	2023-24	Star	66%	14%	12%	7%	66%	11%	13%	10%	68%	12%	11%	9%
7-9	2024-25	Star	75%	11%	9%	5%	75%	11%	8%	6%	72%	11%	11%	6%
7-9	2025-26	IXL	4%	22%	24%	49%	5%	15%	24%	56%				

Total School			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
K-9	2020-21	Star Acadience	61%	16%	15%	7%	73%	12%	10%	5%	75%	10%	7%	7%
K-9	2021-22	Star Acadience	66%	14%	13%	8%	79%	8%	8%	5%	80%	8%	8%	5%
			49%	11%	22%	17%	41%	15%	21%	22%	39%	16%	26%	19%
K-9	2022-23	Star Acadience	68%	13%	13%	7%	75%	9%	11%	6%	76%	8%	8%	8%
			44%	15%	19%	22%	55%	10%	20%	15%	53%	18%	14%	15%
K-9	2023-24	Star Acadience	71%	11%	11%	7%	76%	8%	10%	7%	75%	10%	8%	8%
			46%	11%	19%	24%	60%	10%	13%	18%	56%	12%	14%	18%
K-9	2024-25	Star Acadience	75%	10%	10%	5%	75%	12%	8%	4%	74%	12%	9%	4%
			46%	14%	21%	19%	47%	14%	21%	18%	49%	16%	17%	19%
K-9	2025-26	IXL Acadience	10%	38%	28%	24%	10%	37%	26%	27%				
			41%	13%	22%	23%	46%	13%	19%	22%				

2025-26 BOY Reading Report

Elementary 2020-2026			Beginning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
K	2020-21	Acadience	51%	17%	19%	13%	68%	12%	12%	8%	56%	24%	15%	5%
	2021-22	Acadience	51%	17%	19%	13%	68%	12%	12%	8%	56%	24%	15%	5%
	2022-23	Acadience	41%	27%	13%	19%	45%	22%	21%	12%	44%	29%	21%	6%
	2023-24	Acadience	55%	12%	18%	15%	55%	22%	12%	11%	42%	30%	21%	7%
	2024-25	Acadience	49%	13%	21%	17%	52%	19%	17%	12%	54%	22%	12%	12%
	2025-26	IXL	12%	57%	32%	0%	13%	50%	34%	0%				
1st	2020-21	Star	69%	16%	11%	3%	58%	8%	23%	11%	71%	8%	5%	15%
		Acadience	39%	14%	12%	35%	44%	18%	12%	26%	45%	18%	19%	27%
	2021-22	Star	52%	19%	19%	9%	70%	11%	16%	2%	67%	20%	9%	3%
		Acadience	43%	14%	17%	26%	43%	14%	12%	31%	40%	16%	14%	30%
	2022-23	Star	57%	19%	17%	6%	79%	7%	13%	1%	81%	8%	8%	3%
		Acadience	51%	16%	13%	20%	52%	15%	7%	26%	56%	17%	9%	18%
2nd	2023-24	Star	57%	12%	21%	10%	72%	15%	10%	4%	74%	13%	8%	4%
		Acadience	40%	12%	18%	30%	59%	11%	9%	21%	54%	16%	8%	22%
	2024-25	Star												
		Acadience	45%	15%	20%	20%	48%	11%	11%	30%	48%	14%	10%	28%
	2025-26	IXL	25%	47%	21%	7%	29%	42%	25%	4%				
		Acadience	55%	15%	9%	20%	50%	11%	8%	31%				
3rd	2020-21	Star	57%	14%	18%	10%	64%	12%	12%	13%	64%	6%	10%	14%
		Acadience	49%	23%	6%	21%	55%	19%	7%	19%	60%	13%	16%	11%
	2021-22	Star	50%	9%	10%	31%	66%	9%	9%	16%	91%	5%	3%	1%
		Acadience	49%	15%	11%	25%	47%	25%	4%	24%	45%	20%	15%	20%
	2022-23	Star	56%	11%	18%	15%	69%	12%	8%	11%	75%	9%	6%	11%
		Acadience	44%	22%	13%	21%	48%	23%	5%	24%	43%	25%	16%	17%
4th	2023-24	Star	60%	10%	13%	17%	71%	10%	10%	10%	77%	9%	6%	8%
		Acadience	58%	17%	8%	17%	56%	23%	9%	12%	61%	14%	12%	13%
	2024-25	Star												
		Acadience	55%	17%	9%	20%	51%	23%	10%	16%	49%	20%	13%	18%
	2025-26	IXL	18%	36%	34%	12%	29%	41%	26%	4%				
		Acadience	50%	13%	9%	28%	47%	14%	9%	30%				
5th	2020-21	Star	57%	14%	14%	15%	57%	15%	11%	18%	62%	10%	13%	16%
		Acadience	52%	20%	7%	21%	56%	15%	11%	18%	57%	16%	11%	16%
	2021-22	Star	56%	15%	14%	15%	73%	11%	8%	8%	78%	8%	6%	7%
		Acadience	58%	22%	9%	11%	66%	14%	7%	13%	65%	17%	7%	11%
	2022-23	Star	55%	10%	17%	19%	68%	8%	14%	10%	69%	12%	10%	9%
		Acadience	43%	23%	11%	23%	52%	22%	10%	16%	51%	25%	12%	12%
6th	2023-24	Star	63%	11%	14%	11%	72%	13%	6%	10%	78%	9%	2%	11%
		Acadience	44%	19%	16%	21%	58%	16%	11%	15%	57%	18%	11%	14%
	2024-25	Star												
		Acadience	55%	21%	10%	13%	66%	11%	11%	13%	64%	16%	7%	13%
	2025-26	IXL	13%	25%	37%	25%	21%	33%	27%	19%				
		Acadience	47%	22%	7%	25%	52%	19%	10%	19%				
7th	2020-21	Star	65%	14%	16%	4%	65%	5%	16%	14%	64%	12%	12%	12%
		Acadience	62%	11%	8%	19%	57%	18%	6%	19%	60%	17%	8%	15%
	2021-22	Star	59%	12%	11%	19%	68%	13%	9%	11%	72%	6%	10%	13%
		Acadience	57%	15%	9%	19%	70%	5%	8%	17%	53%	19%	13%	15%
	2022-23	Star	51%	19%	12%	17%	72%	8%	13%	8%	79%	10%	6%	5%
		Acadience	58%	13%	10%	19%	52%	19%	11%	18%	63%	15%	16%	7%
8th	2023-24	Star	65%	13%	11%	10%	71%	14%	9%	6%	77%	10%	7%	6%
		Acadience	54%	18%	17%	11%	57%	23%	8%	12%	57%	25%	10%	8%
	2024-25	Star												
		Acadience	48%	14%	11%	27%	60%	17%	6%	17%	59%	19%	8%	13%
	2025-26	IXL	21%	29%	30%	19%	27%	29%	27%	16%				
		Acadience	68%	13%	9%	10%	57%	19%	10%	14%				
9th	2020-21	Star	62%	14%	11%	12%	68%	12%	13%	7%	68%	14%	13%	7%
		Acadience	70%	7%	18%	5%	73%	12%	8%	7%	68%	14%	13%	5%
	2021-22	Star	62%	15%	12%	12%	73%	15%	7%	5%	72%	16%	9%	3%
		Acadience	64%	4%	20%	12%	70%	5%	8%	17%	63%	12%	15%	10%
	2022-23	Star	61%	17%	9%	13%	72%	14%	4%	11%	71%	10%	10%	9%
		Acadience	60%	9%	18%	13%	53%	15%	17%	15%	53%	19%	13%	15%
10th	2023-24	Star	62%	24%	11%	4%	72%	17%	9%	2%	72%	19%	5%	4%
		Acadience	69%	8%	16%	7%	68%	15%	11%	6%	66%	14%	16%	4%
	2024-25	Star												
		Acadience	57%	14%	22%	8%	67%	15%	11%	7%	63%	16%	12%	9%
	2025-26	IXL	17%	28%	27%	29%	26%	30%	20%	24%				
		Acadience	63%	6%	17%	14%	63%	7%	18%	12%				
11th	2020-21	Star	46%	25%	21%	8%	63%	17%	15%	5%	63%	16%	16%	7%
	2021-22	Star	58%	14%	21%	7%	75%	15%	6%	4%	73%	13%	10%	4%
	2022-23	Star	58%	21%	16%	5%	65%	16%	9%	10%	61%	22%	10%	7%
	2023-24	Star	62%	17%	9%	12%	67%	12%	12%	9%	58%	23%	9%	10%
	2024-25	Star	68%	14%	11%	6%	71%	13%	13%	4%	73%	15%	8%	4%
	2025-26	IXL	25%	24%	20%	31%	28%	21%	19%	32%				

2025-26 BOY Reading Report

Total Elementary			Beginnning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
1-6	2020-21	Star	59%	16%	15%	9%	63%	12%	15%	11%	65%	11%	12%	12%
K-5		Acadience	54%	15%	12%	19%	59%	16%	9%	16%	58%	17%	14%	13%
1-6	2021-22	Star	56%	14%	15%	16%	71%	12%	9%	8%	76%	11%	8%	5%
K-5		Acadience	54%	15%	14%	18%	61%	13%	9%	18%	54%	18%	13%	15%
1-6	2022-23	Star	56%	16%	15%	13%	71%	11%	10%	9%	73%	12%	8%	7%
K-5		Acadience	50%	18%	13%	19%	50%	19%	12%	19%	52%	22%	14%	12%
1-6	2023-24	Star	62%	15%	13%	11%	71%	13%	9%	7%	73%	14%	6%	7%
K-5		Acadience	53%	14%	16%	17%	59%	18%	10%	13%	56%	20%	13%	11%
1-6	2024-25	Star	68%	14%	11%	6%	71%	13%	13%	4%	73%	15%	8%	4%
K-5		Acadience	51%	16%	16%	18%	57%	16%	11%	16%	56%	18%	10%	16%
K-6	2025-26	IXL	19%	35%	29%	18%	25%	35%	25%	14%				
K-5		Acadience	54%	14%	12%	20%	54%	15%	12%	19%				

Middle School			Beginnning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
7th	2020-21	Star	69%	12%	14%	6%	68%	10%	18%	4%	66%	10%	10%	11%
	2021-22	Star	59%	18%	16%	7%	53%	17%	19%	11%	53%	19%	20%	9%
	2022-23	Star	66%	18%	11%	5%	59%	10%	22%	8%	66%	18%	13%	4%
	2023-24	Star	59%	18%	13%	10%	59%	15%	16%	10%	54%	24%	12%	9%
	2024-25	Star	75%	11%	7%	6%	78%	10%	8%	3%	78%	11%	9%	2%
	2025-26	IXL	26%	16%	15%	42%	26%	14%	15%	44%				
8th	2020-21	Star	60%	14%	19%	7%	65%	18%	15%	11%	59%	15%	16%	10%
	2021-22	Star	65%	15%	10%	9%	66%	16%	12%	6%	75%	9%	13%	3%
	2022-23	Star	49%	19%	26%	6%	52%	17%	19%	12%	52%	16%	24%	9%
	2023-24	Star	57%	21%	14%	8%	59%	19%	14%	8%	55%	17%	17%	10%
	2024-25	Star	80%	10%	5%	4%	78%	8%	8%	6%	71%	16%	6%	6%
	2025-26	IXL	25%	20%	15%	40%	26%	13%	17%	44%				
9th	2020-21	Star	67%	17%	14%	2%	58%	17%	17%	8%	59%	15%	17%	9%
	2021-22	Star	72%	10%	8%	10%	68%	15%	10%	7%	66%	18%	13%	4%
	2022-23	Star	70%	15%	9%	6%	70%	14%	12%	4%	68%	21%	9%	1%
	2023-24	Star	56%	11%	21%	13%	53%	10%	22%	14%	53%	21%	21%	5%
	2024-25	Star	74%	16%	8%	1%	82%	7%	8%	0%	80%	14%	4%	1%
	2025-26	IXL	30%	26%	13%	31%	26%	21%	15%	39%				

Total Middle School			Beginnning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
7-9	2020-21	Star	65%	14%	16%	5%	64%	15%	17%	8%	61%	13%	14%	10%
7-9	2021-22	Star	65%	14%	11%	9%	62%	16%	14%	8%	65%	15%	15%	5%
7-9	2022-23	Star	62%	17%	15%	6%	60%	14%	18%	8%	62%	18%	15%	5%
7-9	2023-24	Star	57%	17%	16%	10%	57%	15%	17%	11%	54%	21%	17%	8%
7-9	2024-25	Star	76%	13%	7%	4%	79%	8%	8%	3%	77%	14%	6%	3%
7-9	2025-26	Star	27%	21%	15%	38%	26%	16%	16%	43%				

Total School			Beginnning Benchmark				Middle Benchmark				End Benchmark			
			Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive	Above	Benchmark	Strategic	Intensive
K-9	2020-21	Star	61%	16%	15%	7%	63%	13%	16%	10%	64%	12%	12%	11%
		Acadience	54%	15%	12%	19%	59%	16%	9%	16%	58%	17%	14%	13%
K-9	2021-22	Star	59%	14%	13%	13%	68%	14%	11%	8%	72%	13%	10%	5%
		Acadience	54%	15%	14%	18%	61%	13%	9%	18%	54%	18%	13%	15%
K-9	2022-23	Star	58%	17%	15%	10%	67%	12%	13%	8%	69%	14%	11%	6%
		Acadience	50%	18%	13%	19%	50%	19%	12%	19%	52%	22%	14%	12%
K-9	2023-24	Star	60%	15%	14%	11%	66%	14%	12%	8%	67%	16%	10%	8%
		Acadience	53%	14%	16%	17%	59%	18%	10%	13%	56%	20%	13%	11%
K-9	2024-25	Star	74%	13%	8%	4%	77%	9%	9%	3%	76%	14%	7%	3%
		Acadience	51%	16%	16%	18%	57%	16%	11%	16%	56%	18%	10%	16%
K-9	2025-26	IXL	22%	28%	24%	26%	27%	27%	21%	25%				
		Acadience	54%	14%	11%	20%	53%	15%	12%	21%				



Finance & Accounting Report

Summary, Notes & Action Items

Prepared by: Nicole Desmond
Business Manager
Month Ending: December 31, 2025

Notes

Reporting

- Bond Compliance items submitted in December: Allotment, Insurance Compliance letter, No Default Certification
- Title I DMI completed
- UPEFS Indirect Costs module completed

Balance Sheet

- Days Cash on Hand: **172***

*based on FY26 Original Budget expenses excluding estimated construction costs, bond principal and fees related to refinance

Income Statement

ADJUSTMENTS TO PRIOR PERIODS

- 191 Supplies - Reclassification of items caused movement between multiple lines in the Supply category. Overall change to supply section was decrease of \$381 for November and \$95 for October
- 224 - Equipment - Instruction - Expenses for Playground moved to
227 - Equipment - Facilities

CURRENT PERIOD NOTES

- All Revenue lines are expected at this time
- 197 - Admin Supplies - review by Director ongoing. Some expenses have been reclassified to other budget lines. May still require adjustment in Final Budget.
- 227 - Reflects costs of new playground equipment and installation. Will require budget adjustment in Final Budget.

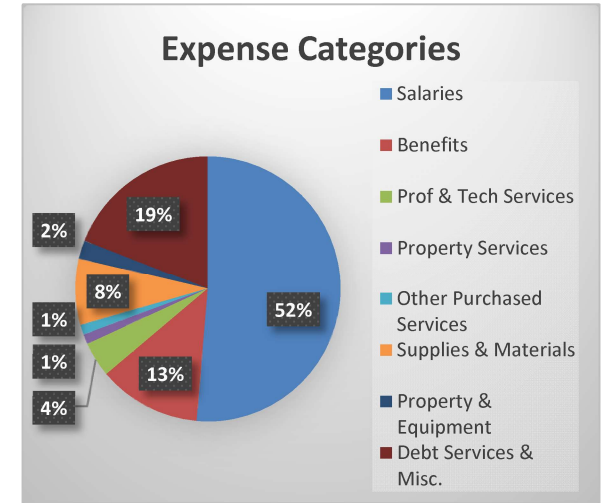
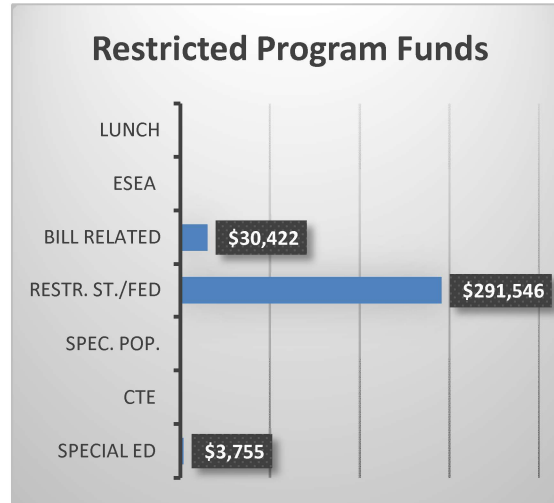
Action Items



Monthly Financial Scoreboard

as of December 31, 2025

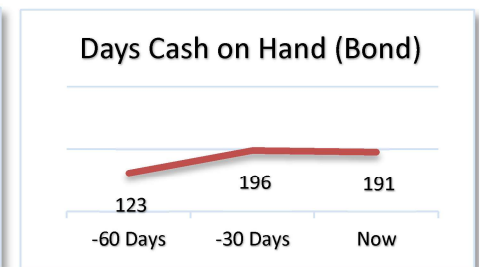
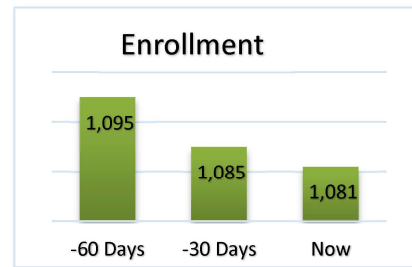
Balance Sheet			% through the year:	50.00%
Assets				
	Prior Month	Current Month		
Operating Cash (Unrestricted)	\$ 7,024,106	\$ 6,838,752		
Restricted Cash	\$ 11,977,340	\$ 10,767,154		
Accounts Receivable	\$ 4,388	\$ 2,255		
Prepaid/Other Assets	\$ 19,154	\$ 19,554		
Total Assets	\$ 19,024,988	\$ 17,627,715		
Liabilities & Fund Balance				
Accounts Payable	\$ 1,646,558	\$ 1,212,385		
Other Current Liabilities	\$ 802,660	\$ 729,660		
Total Liabilities	\$ 2,449,218	\$ 1,942,045		
Unrestricted Fund Balance	\$ 16,188,924	\$ 15,359,946		
Restricted Fund Balance	\$ 386,846	\$ 325,723		
Total Fund Balance	\$ 16,575,770	\$ 15,685,669		
Total Liabilities & Fund Balance	\$ 19,024,988	\$ 17,627,714		



Income Statement - Budget Report				% through the year: 50.00%	
		YTD	Approved	Current	% of
Revenue		Actuals	Budget	Month	Budget
1000	Local	\$ 629,079	\$ 803,465	\$ 93,901	78.30%
3000	State	\$ 6,493,987	\$ 11,966,723	\$ 894,136	54.27%
4000	Federal	\$ 49,541	\$ 390,221	\$ 11,807	12.70%
5000	Other Financing Proceeds	\$ -	\$ 33,780,884	\$ -	0.00%
	Total Revenue	\$ 7,172,607	\$ 13,160,409	\$ 999,844	54.50%
Expenses					
100	Salaries	\$ 3,418,299	\$ 7,121,228	\$ 532,147	48.00%
200	Benefits	\$ 831,987	\$ 2,133,468	\$ 140,264	39.00%
300	Prof & Tech Services	\$ 285,799	\$ 440,125	\$ 27,291	64.94%
400	Property Services	\$ 78,576	\$ 446,600	\$ 19,468	17.59%
500	Other Purchased Services	\$ 80,226	\$ 157,850	\$ 7,919	50.82%
600	Supplies & Materials	\$ 541,425	\$ 1,492,203	\$ 66,303	36.28%
700	Property & Equipment	\$ 149,640	\$ 100,000	\$ 137,075	149.64%
800	Debt Services & Misc.	\$ 1,267,572	\$ 1,569,367	\$ 5,500	80.77%
	Total Expenses	\$ 6,653,524	\$ 13,460,841	\$ 935,967	49.43%
Net Income		\$ 519,083	\$ (300,432)	\$ 63,877	
		>5% positive	within 5%	>5% negative	

>5% positive within 5% >5% negative

Performance Metrics			
Financial Metrics	Prior Year	Now	Standard
Unrestricted Days Cash on Hand (Bond Calc.)	156	191	30 Days
Unrestricted Days Cash on Hand (USCSB Calc.)	151	181	30 Days
Debt to Asset Ratio	0.86	0.86	≤ 1
Current Ratio	2.59	2.00	≥ 1
Annual Cash Flow increase/(decrease)	(342,830)	1,935,094	> 0
Profit Margin (Total Margin)	\$ 0.04	\$ 0.71	> 0
Enrollment Metrics			
Enrollment Trend (Oct 1)	1,061	1,081	≥ 90% PY
Average Daily Membership (ADM)	1031.00	1081.00	≥ 90% Oct 1



*These interim reports are reported on a modified accrual basis and intended for internal use only.

ANNUAL METRIC CALCULATIONS

Key Performance Indicators

Audit Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Trend</u>	<u>Benchmark</u> <u>Application</u>
Current Ratio Net Working Capital				
Current Assets	5,444,836	5,581,673	6,860,561	State:
÷ Current Liabilities	1,050,586	2,155,235	3,428,436	1
<i>This shows how many times the companies could pay its current short-term obligations.</i>	1	2	2	with positive trend
Days Unrestricted Cash on Hand calculation				
Total Unrestricted Cash (cash-restricted cash)	5,246,488	4,903,658	6,838,752	Bond:
÷ Daily Expenses (Annual Expenses / 365 days)	25,696.55	31,421.31	35,892.72	Days
<i>This shows how many days the school can continue operations without additional cash inflow.</i>	2	1	1 1	
Days Unrestricted Cash on Hand state calculation				
Total Unrestricted Cash (cash-restricted cash-programatic restricted cash)	5,069,890	4,731,343	6,513,029	State:
÷ Daily Expenses (Annual Expenses / 365 days)	25,696.55	31,421.31	35,892.72	Days
<i>This shows how many days the school can continue operations without additional cash inflow.</i>	1 7	1 1	1 1	

Profit Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Budget</u> <u>Trend</u>	<u>Benchmark</u> <u>Application</u>
Net Profit Margin Total Margin				
Net Income (Change in Net Position)	895,060	\$ 484,057	\$ 33,480,452	State:
÷ Total Revenues	10,796,334	12,543,200	46,941,293	
<i>This shows how much income is retained by the school for every dollar earned.</i>	2		71 2	
Income per Student				
Total Revenues	10,796,331	12,543,200	46,941,293	
÷ Total # of Students Enrolled	1011	1,061	1,081	
<i>This shows how much in state revenue is earned on a per student basis.</i>	1 7	11 22	2	

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Accountability * Improvement * Monitoring Understanding * Peace of Mind

ANNUAL METRIC CALCULATIONS

Performance Indicators

Performance Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Budget</u> <u>Trend</u>	<u>Benchmark</u> <u>Application</u>
Unrestricted Cash Turnover				
Total Revenues	10,796,331	\$ 12,543,200	\$ 46,941,293	
÷ Total Unrestricted Cash & Cash Equivalents	5,091,827	4,748,997	6,513,029	
<i>This shows how much is received in revenue for every dollar in cash; thus, it shows how effectively a school is utilizing its cash</i>				
	2.12	2	7.21	
Classroom Spending				
Total Instructional Expenses	5,830,668	6,468,975	8,159,864	
÷ Total Revenues	10,796,334	12,543,198	46,941,293	
<i>This shows how much of the total revenues received were put into classroom education.</i>				
	1	1.7	17	
Human Capital Ratio				
Total Wages and Benefits	7,144,587	8,166,223	9,254,696	
÷ Total Revenues	10,796,331	12,543,200	46,941,293	
<i>This shows how much of the total revenues received were spent on wages and benefits.</i>				
	1	1	1.72	

Operation Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Budget</u> <u>Trend</u>	<u>Benchmark</u> <u>Application</u>
Occupancy Ratio				
Total Facilities Expenses	1,443,009	\$ 2,294,711	\$ 14,941,279	
÷ Total Revenue	10,796,331	12,543,200	46,941,293	
<i>This shows how much of the total revenues received were spent on facilities costs.</i>				
	1.7	1.2	1	
Occupancy Expense Ratio				
Total Facilities Expenses	1,443,009	2,294,711	14,941,279	
÷ Total Expenses	10,202,784	12,059,141	13,460,841	
<i>This shows how much of the total expenses were spent on facilities costs.</i>				
	1.1	1	1.11	22
Student Occupancy Ratio				
Total Facilities Expenses	1,443,009	2,294,711	14,941,279	
÷ Total # of Students	1011	1,061	1,081	
<i>This shows the amount of facilities costs on a per student basis.</i>				
	1.27.1	2.1.2.7	1.21.72	

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ANNUAL METRIC CALCULATIONS

Debt Performance Indicators

Debt Service Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Trend</u>	<u>Benchmark</u> <u>Application</u>
Debt Ratio Debt to Asset Ratio				
Total Liabilities	\$ 13,037,146	\$ 34,277,473	\$ 34,277,473	
÷ Total Assets	18,225,317	39,949,701	39,949,701	
<i>This shows how much of the total assets are provided by debt (how much debt is relied on to operate).</i>				<i>State:</i> or 1
	72			

Debt Service Coverage Ratio

Change in Net Assets	895,060	484,057	(9,059,187)	
Add: Interest Expense (Interest & Principal for monthly)	521,177	1,435,469	14,019,217	
Add: Depreciation Expense	522,034	590,364	N/A	
Subtract: Property Expense (monthly calculation only)	N/A	N/A	100,000	
÷ Debt Service Costs (Or Maximum Annual Debt Service, MADS)	2089950	2,089,950	2,089,950	
<i>This shows the ability to cover debt payments.</i>				<i>Bond:</i>
<i>The benchmark can vary from school to school. Check bond documents for your benchmark</i>				1
	27	12	22	

Enrollment Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Trend</u>	<u>Benchmark</u> <u>Application</u>
Enrollment Breakeven				
Total Expenses	\$ 10,202,784	\$ 12,059,141	\$ 13,460,841	
Income Per Student	10,679	11,822	43,424	
<i>This shows how much of the total assets are provided by debt (how much debt is relied on to operate).</i>				
	2	12		

Resources:

[USCSB Accountability Framework](#)

[USCSB Accountability Framework Overview](#)

[UCAP Enrollment Reports](#)

[UCAP Financial Reports](#)

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Lakeview Academy of Science, Arts and Technology
Balance Sheet - Board Report
12/01/2025 to 12/31/2025

	Current Month YTD DRAFT	Prior Month YTD FINAL
Assets		
Cash		
Operating cash		
Checking	5,899,380	6,085,107
Savings	939,072	938,699
Cash on Hand	300	300
Total Operating cash	6,838,752	7,024,106
Restricted cash		
Bond Principal	94,678	63,213
Bond Interest	373,196	290,745
Bond Reserve	2,102,095	2,102,077
Bond escrow - project	7,618,456	8,946,475
Repair and replacement	175,597	175,595
Expense fund	403,081	399,185
Analyzed checking	50	50
Total Restricted cash	10,767,154	11,977,340
Total Cash	17,605,905	19,001,446
Accounts receivable		
Federal	0	0
Sales tax receivable	2,255	4,388
Total Accounts receivable	2,255	4,388
Prepaid and other assets		
Prepaid expense	19,554	19,154
Total Prepaid and other assets	19,554	19,154
Total Assets	17,627,715	19,024,988

Lakeview Academy of Science, Arts and Technology
Balance Sheet - Board Report
12/01/2025 to 12/31/2025

	Current Month YTD DRAFT	Prior Month YTD FINAL
Liabilities and fund balance		
Liabilities		
Accounts payable		
Accounts payable	1,205,239	1,440,007
Payroll and benefits payable	-	192,026
Purchasing liabilities	7,147	14,525
Total Accounts payable	1,212,385	1,646,558
Other current liabilities		
Accrued salaries and wages	306,806	317,549
Accrued withholdings	1,613	63,870
Deferred revenue	421,241	421,241
Total Other current liabilities	729,660	802,660
Total Liabilities	1,942,045	2,449,218
Fund balance		
Beginning fund balance	24,744,856	24,744,856
Net income	(9,059,187)	(8,169,086)
Total Fund balance	15,685,670	16,575,770
Total Liabilities and fund balance	17,627,715	19,024,988

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
Net Income (Loss)						
Revenue						
002 Local Revenue						
005 Interest Income	406,603	526,000	77.30%	49,335	53,488	63,992
006 Activities - After School Programs	42,241	65,665	64.33%	18,560	3,342	3,449
008 Student Fees-Secondary (not K-6)	34,563	11,000	314.21%	9,601	3,321	1,156
009 Local Donations	41,786	44,300	94.32%	1,500	617	11,683
010 Income- Sales & Rentals	6,201	10,000	62.01%	656	1,236	809
011 Other Local Income	1,043	450	231.69%	152	196	116
012 Lunch Fee Student	96,184	145,000	66.33%	14,019	13,584	12,908
013 Lunch Fee Non Student	444	1,000	44.35%	77	211	19
014 Other Food Related Income	15	50	30.00%	-	-	-
Total 002 Local Revenue	629,079	803,465	78.30%	93,901	75,995	94,132

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
021 State Revenue						
022 Regular School Programs K-12	2,452,786	4,553,973	53.86%	371,527	371,597	426,839
024 Educator Salary Adjustment	370,013	744,605	49.69%	60,905	60,905	62,050
025 Class Size Reduction K-8	227,502	475,501	47.84%	34,448	34,448	39,652
026 Charter School Administration	79,183	137,885	57.43%	10,110	16,610	11,490
027 Charter- Local Replacement	2,087,914	3,867,448	53.99%	318,962	318,962	362,498
028 Special Education	379,483	758,488	50.03%	63,208	63,208	63,438
030 Students At-Risk	54,119	105,515	51.29%	9,020	9,927	8,793
031 Student Health and Counseling	13,718	53,937	25.43%	-	13,714	-
032 Teaching & Learning	208,818	182,591	114.36%	(42,752)	9,745	136,005
033 BTS Arts	13,461	27,490	48.97%	2,243	11,217	-
034 School LAND Trust Program	164,636	164,636	100.00%	-	-	-
035 Teacher & Student Success	157,222	254,202	61.85%	26,204	26,204	104,814
036 Teacher Salary Supplemental Program	19,148	38,295	50.00%	3,191	3,191	3,191
037 State Prevention Programs	5,000	5,000	100.00%	-	-	4,000
038 Other State Revenue	235,742	497,157	47.42%	30,979	45,879	34,976
039 Lunch-State Liquor Tax	25,244	100,000	25.24%	6,092	6,662	12,491
Total 021 State Revenue	6,493,987	11,966,723	54.27%	894,136	992,268	1,270,238

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
071 Federal Revenue						
072 IDEA B- Disabled	-	163,522	-	-	-	-
074 Title I Disadvantaged	-	35,150	-	-	-	-
075 Title II Teacher Improvement	-	6,549	-	-	-	-
076 Title IV Student Support	-	10,000	-	-	-	-
078 National School Lunch Progam	48,710	175,000	27.83%	11,807	12,655	24,247
073 ESSER CARES Program	831	-	-	-	-	-
Total 071 Federal Revenue	49,541	390,221	12.70%	11,807	12,655	24,247
091 Other Revenue						
092 Proceeds from Bond Issuance	-	16,000,000	-	-	-	-
097 Budget From Surplus	-	17,780,884	-	-	-	-
Total 091 Other Revenue	-	33,780,884	-	-	-	-
Total Revenue	7,172,607	46,941,293	15.28%	999,844	1,080,919	1,388,617

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
Expense						
102 Salaries 100						
103 Wages-Business Admin & Support	84,100	171,742	48.97%	13,250	17,250	13,250
104 Wages-Principals & Directors	184,606	386,365	47.78%	29,007	32,446	35,233
105 Wages-Instructional Support	137,818	292,625	47.10%	21,385	24,824	26,552
106 Wages-Teachers	1,832,192	3,748,647	48.88%	283,896	331,160	455,754
107 Wages-Teachers-Special Ed	116,850	261,701	44.65%	17,542	21,542	24,559
108 Wages-Substitute Teacher	62,922	150,000	41.95%	14,403	20,756	10,988
109 Wages-Support Services Students	108,623	212,839	51.04%	20,051	22,817	21,393
110 Wages-Admin Support Staff	80,035	162,798	49.16%	12,829	23,262	10,739
111 Wages-Aides & Paraprofessionals	474,968	967,988	49.07%	70,725	170,719	61,850
112 Wages-SpEd Aide & Paraprofess	152,871	359,964	42.47%	22,278	44,633	23,912
113 Wages-Maintenance	92,318	224,288	41.16%	12,908	26,417	11,768
115 Wages-Food Services	90,996	182,271	49.92%	13,871	28,030	11,780
Total 102 Salaries 100	3,418,299	7,121,228	48.00%	532,147	763,857	707,777
121 Benefits 200						
122 Retirement Programs	160,917	392,689	40.98%	30,406	37,566	35,917
123 Social Security & Medicare Tax	216,056	533,575	40.49%	39,140	57,065	43,693
124 Health Benefits	443,047	1,181,377	37.50%	69,459	69,541	68,278
125 Workers Comp	9,206	11,877	77.51%	972	973	973
126 Unemployment Insurance	2,979	13,950	21.36%	314	749	542
127 Other Employee Benefits	(220)	-	-	(28)	262	69
Total 121 Benefits 200	831,987	2,133,468	39.00%	140,264	166,156	149,473

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
131 Purchased Prof & Tech Services 300						
132 Management & Business Services	11,400	23,000	49.57%	1,900	1,900	1,900
133 Instructional Services	31,949	7,000	456.41%	550	800	599
134 Employee Training & Development	1,334	25,900	5.15%	-	-	388
135 Contracted Professional Services	95,446	225,750	42.28%	18,714	20,975	18,972
136 Administrative Support Services	-	5,000	-	-	-	-
137 Computer and Tech Services	33,124	81,375	40.71%	5,344	6,164	5,224
138 Legal and Accounting	91,691	35,000	261.97%	-	-	3,150
139 Other Purchased Services	20,855	37,100	56.21%	784	6,801	1,606
Total 131 Purchased Prof & Tech Services 300	285,799	440,125	64.94%	27,291	36,640	31,839
151 Purchased Property Services 400						
152 Utilities Expenses	30,214	61,600	49.05%	4,893	1,538	8,505
153 Repair & Maint- Comp & Tech	7,482	20,000	37.41%	5,600	-	-
154 Repair & Maint- Facilities	37,921	355,000	10.68%	8,975	9,131	150
155 Repair & Maintenance - Other	-	5,000	-	-	-	-
156 Lease- Rent Expense	2,960	5,000	59.19%	-	130	-
Total 151 Purchased Property Services 400	78,576	446,600	17.59%	19,468	10,799	8,655
171 Other Purchased Services 500						
173 Insurance Expense	43,400	44,550	97.42%	-	-	-
174 Telephone & Internet	2,583	5,000	51.66%	397	397	397
176 Postage & Mailing Expense	811	3,000	27.02%	157	250	-
178 Copy and Print Services	416	5,000	8.32%	18	100	-
179 Advertising- Administration	2,259	10,000	22.59%	1,173	1,086	-
180 Travel- Staff Travel & Mileage	7,214	5,300	136.12%	118	-	-
181 Travel- Field Trips	23,544	85,000	27.70%	6,055	1,328	6,483
Total 171 Other Purchased Services 500	80,226	157,850	50.82%	7,919	3,161	6,880

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
191 Supplies 600						
192 Classroom	146,850	320,000	45.89%	17,092	13,071	29,196
193 Enhancement Supplies	5,295	22,000	24.07%	726	1,516	690
194 Employee Motivation	20,893	50,000	41.79%	4,457	5,693	1,214
195 Employee Training Supplies	15,138	18,500	81.83%	402	76	1,240
196 Special Education	-	2,500	-	-	-	-
197 Administration Supplies	18,913	23,400	80.82%	1,490	1,447	2,090
200 Maintenance & Custodial Supplies	31,531	75,000	42.04%	7,596	3,160	5,811
202 Energy-Electricity & Natural Gas	61,032	143,990	42.39%	10,380	8,965	9,693
203 Textbooks & Instructional Software	26,482	225,000	11.77%	170	-	-
204 Library Books & Supplies	8,898	11,000	80.89%	2,570	175	302
205 Computer and Tech Supplies	109,840	350,000	31.38%	5,370	6,086	1,632
207 Parent Organization Supplies	1,637	9,000	18.19%	-	-	1,637
208 Student Program Supplies	5,546	12,500	44.37%	706	784	2,515
209 Student Motivation Supplies	1,771	12,000	14.76%	662	615	99
212 Lunch Program Supplies	87,601	217,313	40.31%	14,682	15,799	17,203
Total 191 Supplies 600	541,425	1,492,203	36.28%	66,303	57,387	73,323
221 Property (Equipment) 700						
223 Buildings	9,578,269	21,005,452	45.60%	953,978	1,347,281	1,787,308
224 Equipment- Instruction	-	100,000	-	-	-	-
227 Equipment- Facilities	149,640	-	-	137,075	-	-
Total 221 Property (Equipment) 700	9,727,909	21,105,452	46.09%	1,091,053	1,347,281	1,787,308

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
12/01/2025 to 12/31/2025
50.00% of the fiscal year has expired

	Actual YTD	Annual Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
241 Other Objects 800						
242 Dues and Fees	16,190	25,000	64.76%	-	(768)	130
243 Interest Paid- Loans	819,831	1,544,217	53.09%	-	-	819,831
244 Principal Paid- Loans	360,000	11,825,000	3.04%	-	-	360,000
245 Other Debt Service Fees	71,550	650,000	11.01%	5,500	-	2,950
246 Contributions pass through	-	150	-	-	-	-
Total 241 Other Objects 800	1,267,572	14,044,367	9.03%	5,500	(768)	1,182,911
Total Expense	16,231,793	46,941,293	34.58%	1,889,945	2,384,512	3,948,167
Total Net Income (Loss)	(9,059,187)	-	-	(890,100)	(1,303,593)	(2,559,550)

Lakeview Academy of Science, Arts and Technology
Annual Program Report UPEFS

1 Regular School - 07/01/2025 to 12/31/2025

	2026 Actuals	2026 Revised Budget
Net		
General Education (A) Sheet1		
VAR Regular Basic Program		
Total Revenue	3,272,747.04	21,900,424.00
Total Expenditures	12,898,619.56	28,380,882.00
5201 Class Size Reduction		
Total Revenue	227,501.82	434,188.00
Total Expenditures	206,274.56	435,717.00
Total General Education (A) Sheet1	-9,604,645.26	-6,481,987.00
	2026 Actuals	2026 Revised Budget
Special Education (B) Sheet2		
1200-1295 Regular District Programs		
1205 Special Education - Add-On		
Total Revenue	365,916.66	731,833.00
Total Expenditures	359,866.16	858,585.00
Total 1205 Special Education - Add-On	6,050.50	-126,752.00
1210 Special Education - Self-Contained		
Total Revenue	3,661.94	7,323.00
Total Expenditures	4,523.65	9,262.00
Total 1210 Special Education - Self-Contained	-861.71	-1,939.00
1220 Extended Year Program for Severely Disabled		
Total Revenue	8,780.62	11,194.00
Total Expenditures	5,563.70	9,962.00
Total 1220 Extended Year Program for Severely Disabled	3,216.92	1,232.00
1225 Special Education - State Program		
Total Revenue	7,252.86	14,505.00
Total Expenditures	12,771.03	17,056.00
Total 1225 Special Education - State Program	-5,518.17	-2,551.00
Total 1200-1295 Regular District Programs	2,887.54	-130,010.00

	2026 Actuals	2026 Revised Budget
7524 IDEA Level Activity		
Total Revenue	-	161,823.00
Total Expenditures	104,548.08	167,953.00
Total 7524 IDEA Level Activity	-104,548.08	-6,130.00
7522 IDEA-B -- Preschool Disabled (Sec. 619)		
Total Revenue	-	2,585.00
Total Expenditures	3,858.01	3,500.00
Total 7522 IDEA-B -- Preschool Disabled (Sec. 619)	-3,858.01	-915
1278 Extended Year - Special Educators		
Total Revenue	1,096.83	1,096.00
Total Expenditures	229.18	5,508.00
Total 1278 Extended Year - Special Educators	867.65	-4,412.00
Total Special Education (B) Sheet2	-104,650.90	-141,467.00

	2026 Actuals	2026 Revised Budget
Special Populations (D) Sheet4		
5344 Students At-Risk Add-On		
Total Revenue	54,119.09	108,238.00
Total Expenditures	60,384.36	104,522.00
Total 5344 Students At-Risk Add-On	-6,265.27	3,716.00
Total Special Populations (D) Sheet4	-6,265.27	3,716.00

Restricted State or Federal (H) Sheet5

5618 K-3 Reading Software License

Total Revenue	14,400.00	14,400.00
Total Expenditures	14,400.00	14,400.00
Total 5618 K-3 Reading Software License	-	-

5619 Charter School Local Replacement

Total Revenue	2,087,914.01	4,001,684.00
Total Expenditures	1,509,500.20	14,950,445.00
Total 5619 Charter School Local Replacement	578,413.81	-10,948,761.00

5846 State Charter School Start-Up

Total Revenue	147,432.91	147,433.00
Total Expenditures	42,273.96	147,433.00
Total 5846 State Charter School Start-Up	105,158.95	-

5420 School Land Trust Program

Total Revenue	164,636.13	164,636.00
Total Expenditures	44,037.68	177,579.00
Total 5420 School Land Trust Program	120,598.45	-12,943.00

5659 School-Based Education Support Professional Bonus

Total Revenue	66,982.99	66,983.00
Total Expenditures (School)	62,014.13	61,927.00
Total Expenditures (Food Service)	4,987.65	4,986.00
Total Expenditures	67,001.78	
Total 5659 School-Based Education Support Professional Bonus	-18.79	5,056.00

5876 Educator Salary Adjustments

Total Revenue	371,489.91	736,922.00
Total Expenditures	327,825.73	687,240.00
Total 5876 Educator Salary Adjustments	43,664.18	49,682.00

5674 Suicide Prevention

Total Revenue	1,000.00	1,000.00
Total Expenditures	-	1,146.00
Total 5674 Suicide Prevention	1,000.00	-146

	2026 Actuals	2026 Revised Budget
5678 Teacher and Student Success Program (TSSA)		
Total Revenue	157,221.56	314,443.00
Total Expenditures	115,613.00	255,448.00
Total 5678 Teacher and Student Success Program (TSSA)	41,608.56	58,995.00
5679 Student Health and Counseling Support Program		
Total Revenue	13,717.69	53,937.00
Total Expenditures	27,386.14	51,016.00
Total 5679 Student Health and Counseling Support Program	-13,668.45	2,921.00
5655 Digital Teaching & Learning Program		
Total Revenue	9,744.64	41,027.00
Total Expenditures	24,328.31	51,383.00
Total 5655 Digital Teaching & Learning Program	-14,583.67	-10,356.00
5914 School Safety and Support		
Total Revenue	-	22,139.00
Total Expenditures	1,200.00	12,625.00
Total 5914 School Safety and Support	-1,200.00	9,514.00
5673 Electronic Cigarette Substance & Nicotine Prevention		
Total Revenue	4,000.00	4,000.00
Total Expenditures	-	4,585.00
Total 5673 Electronic Cigarette Substance & Nicotine Prevention	4,000.00	-585
Total Restricted State or Federal (H) Sheet5	869,960.69	-10,846,623.00

2026 Actuals 2026 Revised Budget

One-Time and Other Bills (I) Sheet6

5651 Educator Professional Time

Total Revenue	110,790.08	110,790.00
Total Expenditures	111,181.56	111,789.00
Total 5651 Educator Professional Time	-391.48	-999

5868 Teacher Materials & Supplies

Total Revenue	21,300.00	21,300.00
Total Expenditures	15,448.81	21,060.00

900 Transfers IN/ (OUT), net

Total 5868 Teacher Materials & Supplies	5,851.19	240
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5807 Teacher Salary Supplemental Program (TSSP)

Total Revenue	35,327.76	54,475.00
Total Expenditures	11,080.42	37,338.00
Total 5807 Teacher Salary Supplemental Program (TSSP)	24,247.34	17,137.00

5882 BTS Arts

Total Revenue	13,460.51	26,921.00
Total Expenditures	12,745.24	27,489.00
Total 5882 BTS Arts	715.27	-568

5813 Stipends for Future Educators

Total Revenue	13,000.00	13,000.00
Total Expenditures	13,000.22	13,000.00
Total 5813 Stipends for Future Educators	-0.22	-

Total One-Time and Other Bills (I) Sheet6

	30,422.10	15,810.00
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ESEA (L) Sheet 8	2026 Actuals	2026 Revised Budget
7801 Title I A		
Total Revenue	-	35,169.00
Total Expenditures	19,360.91	37,959.00
Total 7801 Title I A	-19,360.91	-2,790.00
Total 7801 Fed ESEA Title I A	-19,360.91	-2,790.00
7860 Fed ESEA Title II A - Teacher Quality		
Total Revenue	-	6,549.00
Total Expenditures	6,747.16	6,865.00
Total 7860 Fed ESEA Title II A - Teacher Quality	-6,747.16	-316
7890 Student Support Services		
Total Revenue	-	10,000.00
Total Expenditures	8,748.70	10,145.00
Total 7890 Student Support Services	-8,748.70	-145
Total ESEA (L) Sheet 8	-34,856.77	-3,251.00

4 Food Service Program - 07/01/2025 to 12/31/2025

	2026 Actuals	2026 Revised Budget
Food Service		
Total Revenue	171,427.50	411,193.00
Total Expenditures	203,275.06	439,726.00
Total Food Service	-31,847.56	-28,533.00
Total Non-Instructional (J) Sheet7	-31,847.56	-28,533.00



Lakeview Academy Board of Trustees Meeting
January 8, 2026 at 7:00 p.m.
527 W 400 N Saratoga Springs, Utah

Lakeview Academy Mission:

Develop Capable, Confident, and Contributing members of society through learning experiences that foster growth, creativity, and character development.

Lakeview Academy's Board of Trustees Role:

The purpose of the board, on behalf of the citizens of Utah, is to see to it that Lakeview Academy (1) achieves what it should according to the Lakeview Academy Charter and state laws and (2) avoids unacceptable actions and situations.

1) Welcome and Roll Call

BEGIN TIME: 7:03PM

IN PERSON ATTENDANCE: Ashley Hintze, Michael Hinckley, Aaron Glass, Lindsay Condie, Tina Smith, Nicole Desmond, Kassy Oveson, and Rick Veasey

ONLINE:

ABSENT: Daniel Dunn

Community Members: Kaylynn Sims

2) Pledge of Allegiance

3) Professional Development

a) Board Retreat Date

The board decided to postpone the retreat to ensure a structured and outcome-driven session with professional facilitation. Tina has reached out to the UAPCS for facilitators and requested formal proposals including costs and methodology. She will provide the board updates via email regarding facilitator contacts and arrangements. Ashley and other board members are asked to provide clear goals to potential facilitators.

b) LEA: updates to R277-123 (Nicole emailed 12/9/25)

The board reviewed updates to the USBE Regulation R277-123, requiring annual non-compliance reviews. The board noted that school policies need to be reviewed and aligned with the updated regulation. The policy committee needs to be formed. The policies found on the school website need to be organized and updated.

4) Reports

a) Director's Report

The majority of the mid-year assessments are completed. The data dives are scheduled for next week. The reports will be shared at the February board meeting.

The lottery enrollment is within expectations. Rick will send periodic updates to the board's email. Efforts are being made to increase community awareness and lottery participation.

Marketing strategies were discussed. These include new banners in front of school, yard signs for families and enhanced open house events with possible incentive for referrals. It was suggested to do a special open house targeting kindergarten and seventh grade which are the entry points.

Rick talked about participating in the community events such as Splash Days. Lakeview will be celebrating its 20 year anniversary this year and it was suggested to do a long day of introductory activities and use it as an opportunity to reach out to the community.

Current 6th grade students from other schools have been invited to participate in a space mission at Lakeview in hopes of increasing enrollment.

The school is in the process of replacing the Marquee in front. Rick is currently working on bids.

Teacher retention remains strong. New teacher recruitment is delayed until after January 20th due to platform changes. Student retention is also strong with about 90% return rate. The biggest drop is 7th grade, which is considered a transition year.

Lindsay asked about full day kindergarten feedback. Rick said that full-day kindergarten participation increased, reducing partial-day attendance to approximately 12 students, improving instructional consistency. Partial day students are divided into classrooms evenly.

Kindergarten class placements were refined using beginning of year assessments and teacher collaboration to balance classrooms and meet student needs.

Ashley asked about the cut off days to switch classrooms. Rick said it was Oct. 1st. When kindergarten students choose full day, then it stays full day unless circumstances change such as an IEP or administrative recommendations.

All kindergarten students receive academics in the morning block. The afternoon block focuses on specialties and enrichment activities. New content is not being added in the afternoon, rather, existing content is spread across the full day.

b) Board Member's Reports

Lindsay Condie submitted her resignation from the board effective at the conclusion of the January 8, 2026 meeting due to increased personal responsibilities. It was noted that Lindsay served on the board for almost 4 years. She has agreed to remain involved with the expansion committee as the Chief School Building Bond Officer (CSBBO). She also agreed to serve on the Professional Advisory Committee to maintain access to institutional knowledge pending board approval.

Ashley reported that the Christmas staff lunch was successful and that there was a lot of food left over. The teachers enjoyed taking the leftovers home.

Tina talked about board training opportunities on the handout given to board members at the meeting. A conference will be held June 9-10. Board members can receive a scholarship to attend the conference if attending the monthly zoom training opportunities.

Tina explained the enrollment sheet from the ratings presentation with S &P. It showed the target enrollment for Lakeview which is part of the rating process investors look at. Aaron asked if this could be sent out by

email. Tina said she would send the presentation to the board.

i) CAP report and assignments

No comments.

c) Board Committee Reports

i) Policy Committee

School policies on websites are outdated, inconsistent and may contain duplicates (i.e. multiple finance policies). Policies need to be organized, updated and aligned with recent legislation. A solution was proposed to conduct a training/planning session for the policy committee prior to board retreat. Considerations for volunteers help from non-board members to support policy committee workload. In need of mapping out existing policies to identify gaps and outdated documents.

ii) Expansion Committee

Rick provided comprehensive updates on the expansion, with a substantial completion date of September 12, 2026.

The East classroom is 90% complete. Remaining work includes electrical connections to the lighting system, installing sprinkler covers, gap filled and trim around roof installed. The room will not be open for use until security systems are fully functional.

The North building is nearing completion. Everything has been painted, tile & carpet installation is underway. They are testing all outlets. The HVAC system was activated over Christmas break with the new transformer installed for capacity. Expected completion is in February.

The South Building (Art Wing) is continuing. The contractors have framed the second floor, pouring concrete for theater seating. The framing completion was pushed back one week, but will not delay other trades.

The playground installation was finished over Christmas break. It is now being used by students. Lindsay asked if the swings raised the insurance. Rick said insurance was not affected because all equipment is certified for age groups. It has been a great addition to the school.

Aaron asked about board committees and where parents can help. Michael wanted clarification about the policy committee and would like to have a meeting for strategies and training.

It was commented that the policy committee has the most significant work load. The expansion committee could also benefit from volunteer support.

Tina talked to David about project financing and the second phase. Need approximately \$2-3 million dollars, which was part of the plan. Nicole and David also talked about strategies and the finance authority process. A meeting is scheduled for January 30th with the finance authority. A meeting is scheduled with the expansion committee the first week of February. Timing is critical; delays could jeopardize project completion timeline. The expansion committee is expected to present options to the board at the February meeting. The board will need to approve before moving forward.

(1) Naming in stewardship update

Aaron asked if the project is being delayed because we haven't named the building. The answer was no.

iii) Financial Audit Committee

No comments.

d) October & November Financial & Accounting Reports

- i) Financial Scoreboard
- ii) Monthly Financial Metrics
- iii) Balance Sheet Report
- iv) Income Statement Report
- v) Check Register Report
- vi) P-Card Purchase Reports

Nicole presented two months of reports since we didn't have a meeting in December. Revenues exceeding budget projections due to the October 1 count. The budget was designed conservative which allows for these surplus funds to be used where needed.

A revised budget hearing anticipated around March (possibly February) to determine allocation of excess funds. Rick is compiling a list of desired expenditures for this year.

All expense lines aligned with expectations. Any out of line items have been previously discussed.

Overall the school is in a healthy financial position, we are compliant with budget requirements and are on track with financial planning.

Aaron asked about activity budgets. Nicole said we don't have a good report for that but can share activity registers if requested.

MOTION BY: Michael moved to accept the financial and accounting reports.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith, Lindsay Condie

No Vote: None

Abstain: None

MOTION PASSES

4) Public Comment: The public may address any issue unrelated to items already on the agenda.

Participants are asked to state their names for the official minutes, and please be concise. If you cannot attend the meeting, email your comments to bot@lakeview-academy.com to be included in the minutes. Please submit your comments no later than two hours prior to the start of the meeting.

No comments.

5) Consent Agenda

- a) Minutes November 13, 2025
- b) MTI Contract for spring play
- c) Criminal Background Check update

No comments.

MOTION BY: Aaron moved to accept the consent agenda.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith, Lindsay Condie

No Vote: None

Abstain: None

MOTION PASSES

6) Action Items

a) Firearm Safety Curriculum

Rick reminded the board of the state legislative requirements for firearm safety training for students. Rick reached out to SRO in the community. The Alpine School Districts model was reviewed for elementary instruction. Rick discussed the idea that a few specialty teachers will present to students to ensure consistency with all grades.

Tina and Aaron asked about middle school student firearm curriculum. Rick said he would do more research on what options are available for middle school and present at a future meeting.

Aaron asked about guidelines for teacher training. Rick said he would train teachers to stick to the script to maintain consistency and political neutrality. The focus is on student safety and responsibility.

MOTION BY: Tina moved to approve the Elementary Firearm Safety Curriculum.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith, Lindsay Condie

No Vote: None

Abstain: None

MOTION PASSES

Rick asked a clarifying question. MS curriculum not approved at this time. This will be discussed at the next meeting.

b) Board Appointments

The board discussed the role Lindsay Condie will participate in after her resignation from the board. It was noted that the CSBBO role does not require board membership, allowing this continuity without formal board status. Her ongoing involvement supports smooth project progress and governance stability during the expansion phase.

MOTION BY: Ashley Hintze moved that the board appoint Lindsay Condie to continue serving as CSBBO and Chair of the Expansion Committee for Lakeview Academy through the receipt of the Certificate of Occupancy.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith

No Vote: None

Abstain: Lindsay Condie

MOTION PASSES

The board discussed appointing Lindsay to be a part of the Professional Advisory Committee, enabling previous confidential knowledge sharing and support for current board members. It adds a layer of delegated authority to talk to previous board members about financing and other board related things. Members are allowed to talk about open session items as well as invite them to closed sessions.

The Professional Advisory Committee membership and terms require review and cleanup to maintain relevancy and clear roles.

MOTION BY: Michael Hinckley moved to appoint Lindsay Condie to the Board's Professional Advisory Committee.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith

No Vote: None

Abstain: Lindsay Condie

MOTION PASSED

MOTION BY: Ashley Hintze moved to accept the resignation of Lindsay Condie, effective at the conclusion of the January 8, 2026 Board meeting.

Yes Vote: Ashley Hintze, Michael Hinckley, Aaron Glass, Tina Smith

No Vote: None

Abstain: Lindsay Condie

MOTION PASSES

7) Closed Session

No closed session called.

- a) A motion to enter a closed session per Utah Code 52-4-205 to discuss litigation matters, acquisition of real property, or authorized personnel issues (all motions, except the motion to exit the closed session, will be made in an open meeting).
- b) Return to Open Meeting
- c) Action may be taken regarding litigation matters, acquisition of real property, or authorized personnel issues.

8) Adjourn

Tina Smith moved to adjourn.

END TIME: 8:12PM

Meeting Duration: 69 minutes

Lakeview Academy Final Report 2024-2025

2024 - 2025



Please Finish your Final Report Submission

Financial Proposal and Report

This report is automatically generated from the approved School Plan (entered in spring of 2024), Amendments, and the LEA's data entry of the School LAND Trust expenditures coming from the Utah Public Education Finance System (UPEFS).

Description	Planned Expenditures (entered by the school)	Amended Expenditures (Refer to bottom of Report)	Actual Expenditures (entered by the LEA)	
Carry-Over from 2023-2024	\$0.00	\$0.00	\$0.00	
Distribution for 2024-2025	\$150,330.91	\$0.00	\$150,330.91	
Total Available for Expenditure in 2024-2025	\$150,330.91	\$0.00	\$150,330.91	
Salaries and Benefits	\$85,000.00	\$0.00	\$84,187.37	
Contracted Services	\$0.00	\$0.00	\$0.00	
Professional Development	\$0.00	\$0.00	\$0.00	
	Planned Expenditures	Amended Expenditures	Actual Expenditures	

Description	Planned Expenditures (entered by the school)	Amended Expenditures (Refer to bottom of Report)	Actual Expenditures (entered by the LEA)	
Student Transportation Field Trips	\$0.00	\$0.00	\$0.00	
Books Curriculum Subscriptions	\$0.00	\$0.00	\$0.00	
Technology Related Supplies	\$65,330.91	\$0.00	\$66,143.54	
Hardware, etc.	\$0.00	\$0.00	\$0.00	
Software	\$0.00	\$0.00	\$0.00	
Technology Device Rental	\$0.00	\$0.00	\$0.00	
Video Communication Services	\$0.00	\$0.00	\$0.00	
Repair Maintenance	\$0.00	\$0.00	\$0.00	
General Supplies	\$0.00	\$0.00	\$0.00	
Services Goods Fees	\$0.00	\$0.00	\$0.00	
Other Needs Explanation	\$0.00	\$0.00	\$0.00	
Non Allowable Expenditures	\$0.00	\$0.00	\$0.00	

	Planned Expenditures	Amended Expenditures	Actual Expenditures	
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Description	Planned Expenditures (entered by the school)	Amended Expenditures (Refer to bottom of Report)	Actual Expenditures (entered by the LEA)	
USBE Administrative Adjustment - Scroll to the bottom to see Comments.			\$0.00	
Total Expenditures	\$150,330.91	\$0.00	\$150,330.91	
Remaining Funds (Carry-Over to 2025-2026)	\$0.00		\$0.00	

Goal #1

close

Goal Statement

close

Our goal is to increase the number of students meeting our Charter specific goal to complete at least one technology project and for staff to utilize technology daily in reading lessons. Doing so in order to improve reading performance by 1% from BOY to EOY assessment in grades K-6.

Academic Area

close

- Reading

Measurements

close

Measurements
This is the measurement identified in the plan to determine if the goal was reached.

We will use the reading test to measure BOY and EOY performance for students. We expect to see a 1% improvement in our school from BOY to EOY. We continue to see a need to improve the number of students reading at grade level since the soft closures of the pandemic

Please choose one of the following two options to complete the Measurements section:

1. Explain how academic performance was improved or not, and describe how the before and after measurement data supports the improvement.
2. Explain how academic performance was improved or not, and attach measurement data from before and after plan implementation in the Attachments Section below. (If you choose this option, please put a note in your explanation to "see attached document").

We used the funds as expected on this goal. We saw a increase of proficiency on our reading test from BOY 67% to EOY 74%. We met this goal.

Action Plan Steps and Expenditures

close

These are the Action Steps identified in the plan to reach the goal:

1. Survey staff on needed technology
2. Purchase technology for student and teacher use (150 chromebooks, PC laptops, 4 new computer carts)
3. Train staff and students on how to use new technology
4. Plan and implement technology projects in grades 1-9
5. Observe and record completion of this Charter goal
6. Plan and implement how technology will be used to help teach reading and writing skills
7. Measure student performance at BOY and EOY using Reading assessment

... measure student performance at EOY and EOY using reading assessment

Were the Action Steps (including any approved Funding Changes described below) implemented and associated expenditures spent as described?

- ☒ Yes
- ☐ No

Category	Description	Estimated Cost
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	Step 2	\$65,330.91
	Total:	\$65,330.91

Goal #2

close

Goal Statement

close

Lakeview Academy will use staff members to improve student demonstration of science standards mastery during the 2024-2025 year.

Academic Area

close

- Science

Measurements

[close](#)

Measurements

This is the measurement identified in the plan to determine if the goal was reached.

Students will complete benchmark assessments on grade level standards. Students have struggled to master each standard as they have been changed recently. The benchmarks will be analyzed during Team data dive PLC meetings and used to help measure needed instruction, lesson effectiveness and student achievement.

Please choose one of the following two options to complete the Measurements section:

1. Explain how academic performance was improved or not, and describe how the before and after measurement data supports the improvement.
2. Explain how academic performance was improved or not, and attach measurement data from before and after plan implementation in the Attachments Section below. (If you choose this option, please put a note in your explanation to "see attached document").

This goal was met and funds were spent according to the plan. Students completed benchmark assessments on RISE and teacher assessments. The PLC reviewed the data and has set learning goals for teams accordingly.

Action Plan Steps and Expenditures

[close](#)

These are the Action Steps identified in the plan to reach the goal:

1. Hire staff to deliver science lessons on specific standards identified by team data dive PLC meetings.
2. Staff will meet with classroom teachers to plan lessons and review student performance data.
3. Lessons will be observed by administration to ensure effectiveness in achieving learning goals.

Were the Action Steps (including any approved Funding Changes described below) implemented and associated expenditures spent as described?

- ☒ Yes
☐ No

Category	Description	Estimated Cost
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	Steps 1,2 and 3.	\$85,000.00
	Total:	\$85,000.00

Summary of Estimated Expenditures

Category	Estimated Cost (entered by the school)
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	\$85,000.00
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	\$65,330.91
Total:	\$150,330.91

Publicity

[Click here to order free stickers for identifying School LAND Trust purchases such as books or computers.](#)

The following items are the proposed methods of how the Plan would be publicized to the community:

- Other: Please explain
- School marquee
- School newsletter or website
- Social Media

The school plan was actually publicized to the community in the following way(s):

- ☐ Letters to policymakers and/or administrators of trust lands and trust funds
- ☐ Other: Please explain
- ☐ School assembly
- ☒ School marquee
- ☐ Stickers that identify purchases made with School LAND Trust funds
- ☒ School newsletter or website
- ☒ Social Media

Council Plan Approvals

Number Approved	Number Not Approved	Number Absent	Vote Date
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Number Approved	Number Not Approved	Number Absent	Vote Date
8	0	0	2024-03-15

Plan Amendments
Amendment #1

Please Note:
This amendment is not yet awaiting any review. Edits can be made.

Number Approved:

Number Not Approved:

Absent:

Council Vote Date:

Explanation for Amendment:

Was the Amendment implemented and associated expenditures spent as described?

Need to add an attachment?
You may add documents here that support the text description in the Measurement section of each goal.

Comments

Date	Name	Comment
2024-04-12	Kira Bennett	Academic areas should only be selected if they are being measured to determine if a goal is successfully met. Please update Goal 1’s academic areas to what is being measured. (You’ve stated that reading is what is being measured - so please only select reading as an academic area).

Date	Name	Comment
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Date	Name	Comment
2024-04-12	Kira Bennett	Goal 1 does not meet the requirement under 53G-7-1206, that a specific list of programs, practices, materials, or equipment is listed for the planned use of SLT funds. Please provide more specificity for this action plan step/expenditure in regards to technology. Define what technology will be purchased. If you are surveying staff, and won't decide now, you must put a statement into your plan that once technology is identified you will submit an amendment defining the technology and have it approved by the council, board, LEA, and SCT prior to using SLT funds to purchase it.
2024-04-12	Kira Bennett	Academic areas should only be selected if they are being measured to determine if a goal is successfully met. Please update Goal 2's academic areas to what is being measured. (You've stated that science is what is being measured - so please only select science as an academic area).
2024-04-17	Kira Bennett	Updates for first 2 comments for academic area for goal 1 and specificity in action steps in goal 1 have not been made.

Final Report Comment

Review before Submitting

Please review before submitting. There will be no review page. Once submitted the report may only be revised through the review process by the LEA or Charter Authorizer. Once the review is complete, the report may not be edited.

☐ This form is ready for display on the public website. Spelling and grammar are correct. Student names and individual data are not included.

BACK
