



Lakeview Academy Board of Trustees Meeting
April 16, 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. Reports

- a. Director's Report
- b. Board Member's Reports
 - i. Board Retreat Update
 - ii. CAP report and assignments
 - iii. Board Election Process
 - 1) Parent Elect information
- c. Board Committee Reports
 - i. Policy Committee
 - 1) Committee outreach efforts
 - ii. Expansion Committee
 - iii. Financial Audit Committee
- d. February 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. FY26 Q2 Report

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.

5. Consent Agenda

- a. Minutes March 12, 2026.
- b. UCSFA CE Addendum
- c. UCSFA LA Financing App
- d. Engagement Letter for Arbitrage Compliance Services

7. Action Items

- a. School Land Trust Plan 2026-2027
- b. Republic Services 3 year contract
- c. Strategic Planning Facilitator

8. 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. fAction may be taken regarding litigation matters, acquisition of real property, or authorized personnel issues.

9. Adjourn

MONTHLY DIRECTORS REPORT

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

a) Language Arts and Mathematics Ends Policy

Preparations for EOY testing is happening. This will be Acadience and RISE testing.

b) Science, Arts, and Technology Ends policy

The CAP includes information regarding events that meet this policy.

c) Parent Satisfaction Ends Policy

2026-2027 (next round 4/3/2026)

Grade	Total 2026-2027 Projected	Enrolled	Remaining Waitlist
K	130	125	127
1	130	127	44
2	130	129	42
3	135	134	39
4	135	130	12
5	135	134	29
6	108	112	41
7	140	137	29
8	115	112	2
9	108	105	2
Total	1266	1245	367

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

- a) **Business/finance/IT** – All reports are being completed on time.
- b) **Special Education, Business reports, Accreditation** –No new updates at this time.
- c) **Staff updates** – We hired a new MS math teacher for the open position we were recently made aware of. Again, we are staffed for next year.

Wording in newsletter for Parent elect position:

Parent Elect Board Position

The Lakeview Academy board of trustees has an opening for a parent elect board position. For those interested in running for this role, please click the link below and fill out the form. Applications will be accepted through [date] and elections will take place the following month.

[Parent Elect Application]

On Parent elect form:

Online Form for Parent Elect Board Position

On a charter school board, elected parent members ensure that parents have a voice in school-specific issues.

They are elected by fellow parents for two year terms to provide, review data, and be a voice for students and families.

This role includes the following responsibilities:

- **Ambassador:** Parents serve as community ambassadors, advocates, and periodically attend school functions.
- **Accountability:** They ensure the school adheres to its charter agreement and addresses school needs.
- **School Land Trust Plan:** Review plans that outlines how school funds are used and measuring academic progress.
- **Advisory and Governance:** Provide input on academic priorities, school policy, and safety principals.

- Advocacy & Representation: Serve as ambassadors for the community and act as a liaison between parents and the administration.

Election Process and Requirements

- Eligibility: Must be a parent or guardian of a student enrolled at the school during the term.
- Meeting: the board meets on the second Thursday of each month. Periodic live online training will be available and attendance is encouraged.
- Terms: Parent members may serve a two-year term or successive terms if they continue to have a student enrolled.

All information and uploads shared on the application are to be made publicly available through the election process.

Questions for form:

Full Name:

Contact phone:

Contact email:

Names of children enrolled and in what grade:

Why you want to serve on the board:

What you hope to contribute in the school's mission and success:

Relevant experience and skills:

Attach a profile photo:



Finance & Accounting Report

Summary, Notes & Action Items

Prepared by: Nicole Desmond
Business Manager

Month Ending: February 28, 2026

Notes

Reporting

- Bond Compliance items submitted in February: Allotment, FY2026 Q2 Financials

Balance Sheet

- Days Cash on Hand: **181***

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

Income Statement

ADJUSTMENTS TO PRIOR PERIODS

None

CURRENT PERIOD NOTES

- All Revenue lines are as 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.
- 204 - Includes cost of new tables for Library that were purchased using Start Up Grant funds. Budget will be adjusted to include these items.
- 222 - Reflects costs of deposit on new Marquee. Will require budget adjustment in Final Budget.
- 227 - Reflects costs of new playground equipment and installation. Will require budget adjustment in Final Budget.

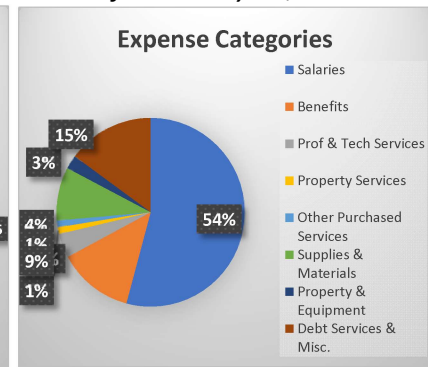
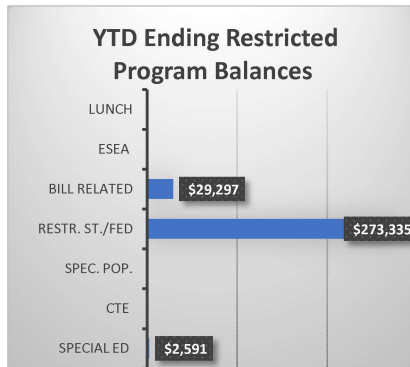
Action Items



Lakeview Academy Monthly Financial Scoreboard

as of February 28, 2026

Balance Sheet			% through the year: 66.67%	
Assets	Prior Month	Current Month		
Operating Cash (Unrestricted)	\$ 6,802,748	\$ 6,903,199		
Restricted Cash	\$ 9,564,512	\$ 8,873,208		
Accounts Receivable	\$ 3,211	\$ 2,147		
Prepaid/Other Assets	\$ 19,552	\$ 19,555		
Total Assets	\$ 16,390,023	\$ 15,798,109		
Liabilities & Fund Balance				
Accounts Payable	\$ 907,358	\$ 1,153,709		
Other Current Liabilities	\$ 796,918	\$ 865,860		
Total Liabilities	\$ 1,704,276	\$ 2,019,569		
Unrestricted Fund Balance	\$ 14,685,834	\$ 13,473,316		
Restricted Fund Balance	\$ -	\$ 305,223		
Total Fund Balance	\$ 14,685,834	\$ 13,778,539		
Total Liabilities & Fund Balance	\$ 16,390,110	\$ 15,798,108		



Income Statement - Budget Report						% through the year: 66.67%	
Revenue		YTD		Proposed		% of	
		Actuals	Budget	Current Month	Budget		
1000	Local	\$ 756,952	\$ 803,465	\$ 65,334		94.21%	
3000	State	\$ 8,397,865	\$ 11,966,723	\$ 937,893		70.18%	
4000	Federal	\$ 150,718	\$ 390,221	\$ 23,626		38.62%	
5000	Other Financing Proceeds	\$ -	\$ -	\$ -		#DIV/0!	
Total Revenue		\$ 9,305,535	\$ 13,160,409	\$ 1,026,853		70.71%	
Expenses							
100	Salaries	\$ 4,623,012	\$ 7,121,228	\$ 637,416		64.92%	
200	Benefits	\$ 1,113,868	\$ 2,133,468	\$ 136,558		52.21%	
300	Prof & Tech Services	\$ 351,033	\$ 440,125	\$ 33,778		79.76%	
400	Property Services	\$ 98,566	\$ 446,600	\$ 6,741		22.07%	
500	Other Purchased Services	\$ 96,664	\$ 157,850	\$ 10,019		61.24%	
600	Supplies & Materials	\$ 782,079	\$ 1,492,203	\$ 92,771		52.41%	
700	Property & Equipment	\$ 200,424	\$ 100,000	\$ -		200.42%	
800	Debt Services & Misc.	\$ 1,273,739	\$ 2,066,417	\$ -		61.64%	
Total Expenses		\$ 8,539,385	\$ 13,957,891	\$ 917,283		61.18%	
Net Income (USCSB Metric ≥ 0)		\$ 766,150	\$ (797,482)	\$ 109,570			
		>5% favorable	within 5%	>5% unfavorable			

Performance Metrics			
USCSB	Prior Year	Now	Standard
Unrestricted Days Cash on Hand	167	211	60 Days
Facilities Ratio	9.2%	21.1%	≤ 20%
Salaries & Benefits Ratio	24.7%	54.1%	≤ 60%
Profit Margin (Total Margin)	1.5%	-6.1%	> 0 & 3YR >0 *
Debt Service Coverage Ratio (Bond)	120.1%	-434.6%	> 110 %
Material Audit Findings	0	N/A	None
Debt Default (covenants or payments)	0	0	None
Oct 1 Enrollment	1,061	1,103	



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

*Some metrics have multi-year or multiple ways to meet the metric. See the Charter School Accountability Framework, or Aegis wiki for more information.

ANNUAL METRIC CALCULATIONS

Key Performance Indicators

Liquidity Measures

	<u>2 Years Prior End Ratio</u>	<u>Prior Year End Ratio</u>	<u>Current Trend</u>	<u>Benchmark if Applicable</u>
Current Ratio (Net Working Capital)				
Current Assets	4,775,255	5,444,836	6,924,901	
÷ Current Liabilities	979,386	1,050,586	3,609,919	
<i>This shows how many times the companies could pay its current short-term obligations.</i>				<i>Standard:</i>
	4.88	5.18	1.92	≥ 1.0
Days Unrestricted Cash on Hand				
Total Unrestricted Cash (cash and equivalents)	4,553,702	5,246,488	6,903,199	<i>Bond:</i>
÷ Daily Expenses (Annual Expenses / 365 days)	25,696.55	31,421.31	32,749.79	≥ 60 Days
<i>This shows how many days the school can continue operations without additional cash inflow.</i>				<i>USCSB:</i>
	177	167	211	≥ 60 Days

Profitability Measures

	<u>2 Years Prior End Ratio</u>	<u>Prior Year End Ratio</u>	<u>Current Budget Trend</u>	<u>Benchmark if Applicable</u>
Net Profit Margin (Total Margin)				
Net Income (Change in Net Position)	895,060	\$ 484,057	\$ (797,482)	
÷ Total Revenues	10,796,334	33,058,737	13,160,409	<i>USCSB:</i>
<i>This shows how much income is retained by the school for every dollar earned.</i>				> 0 &
<i>*see fraework for alternate benchmarks</i>	8.29%	1.46%	-6.06%	3yr aggr >0
Income per Student				
Total Revenues	10,796,331	33,058,737	13,160,409	
÷ Total # of Students Enrolled	1,011	1,061	1,075	
<i>This shows how much in state revenue is earned on a per student basis.</i>				
	10,678.86	31,158.09	12,242.24	

AIM UP! for Charter School Success

Accountability * Improvement * Monitoring Understanding * Peace of Mind

ANNUAL METRIC CALCULATIONS

Key Performance Indicators

Performance Measures

	<u>2 Years Prior End Ratio</u>	<u>Prior Year End Ratio</u>	<u>Current Budget Trend</u>	<u>Benchmark if Applicable</u>
Unrestricted Cash Turnover				
Total Revenues	10,796,331	\$ 33,058,737	\$ 13,160,409	
÷ Total Unrestricted Cash & Cash Equivalents	4,553,702	5,246,488	6,903,199	
<i>This shows how much is received in revenue for every dollar in cash; thus, it shows how effectively a school is utilizing it's cash</i>				
	2.37	6.30	1.91	
Classroom Spending				
Total Instructional Expenses	5,830,668	6,468,975	7,735,500	
÷ Total Revenues	10,796,331	33,058,737	13,160,409	
<i>This shows how much of the total revenues received were put into classroom education.</i>				
	54.01%	19.57%	58.78%	
Salaries & Benefits Ratio (Human Capital Ratio)				
Total Wages and Benefits	7,144,587	8,166,223	7,121,228	
÷ Total Revenues	10,796,331	33,058,737	13,160,409	
<i>This shows how much of the total revenues received were spent on wages and benefits.</i>				
	66.18%	24.70%	54.11%	USCSB: < 60%

Operation Measures

	<u>2 Years Prior End Ratio</u>	<u>Prior Year End Ratio</u>	<u>Current Budget Trend</u>	<u>Benchmark if Applicable</u>
Facility Ratio (Occupancy Ratio)				
Total Facilities Expenses	1,953,706	\$ 3,047,434	\$ 2,771,824	
÷ Total Revenue	10,796,331	33,058,737	13,160,409	
<i>This shows how much of the total revenues received were spent on facilities costs.</i>				
	18.10%	9.22%	21.06%	USCSB: < 20%
Occupancy Expense Ratio				
Total Facilities Expenses	1,953,706	3,047,434	2,771,824	
÷ Total Expenses	10,202,784	14,630,272	13,957,891	
<i>This shows how much of the total expenses were spent on facilities costs.</i>				
	19.15%	20.83%	19.86%	
Student Occupancy Ratio				
Total Facilities Expenses	1,953,706	3,047,434	2,771,824	
÷ Total # of Students	1011	1,061	1,075	
<i>This shows the amount of facilities costs on a per student basis.</i>				
	1,932.45	2,872.23	2,578.44	

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ANNUAL METRIC CALCULATIONS

Key Performance Indicators

Leverage Measures

	<u>2 Years Prior</u> <u>End Ratio</u>	<u>Prior Year End</u> <u>Ratio</u>	<u>Current Trend</u>	<u>Benchmark if</u> <u>Applicable</u>
Debt Ratio (Debt to Asset Ratio)				
Total Liabilities	\$ 13,313,546	\$ 13,037,146	\$ 2,765,610	
÷ Total Assets	17,606,657	18,225,317	41,025,087	
<i>This shows how much of the total assets are provided by debt (how much debt is relied on to operate).</i>				
	0.76	0.72	0.07	Standard: < or = 1.0
Debt Service Coverage Ratio				
Change in Net Assets	895,060	484,057	(10,966,317)	
Add: Interest Expense (Interest & Principal for monthly)	521,177	1,435,469	1,981,267	
Add: Depreciation Expense	522,034	590,364	N/A	Bond:
Subtract: Property Expense (monthly calculation only)	N/A	N/A	100,000	> 115%
÷ Debt Service Costs (Or Maximum Annual Debt Service, MADS)	2090450	2,090,450	2,090,450	
<i>This shows the ability to cover debt payments.</i>				
<i>The benchmark can vary from school to school. Check bond documents for your benchmark</i>				
	92.72%	120.06%	-434.60%	USCSB: >110%

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 if</u> <u>Applicable</u>
Enrollment Breakeven				
Total Expenses	\$ 10,202,784	\$ 14,630,272	\$ 13,957,891	
Income Per Student	10,679	31,158	12,242	
<i>This shows how much of the total assets are provided by debt (how much debt is relied on to operate).</i>				
	955.42	469.55	1140.14	

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
02/01/2026 to 02/28/2026

	Current Month YTD DRAFT	Prior Month YTD FINAL
Assets		
Cash		
Operating cash		
Checking	5,963,030	5,862,932
Savings	939,669	939,381
Cash on Hand	500	435
Total Operating cash	6,903,199	6,802,748
Restricted cash		
Bond Principal	157,855	126,235
Bond Interest	516,203	447,466
Bond Reserve	2,101,155	2,101,824
Bond escrow - project	5,506,350	6,303,729
Repair and replacement	175,518	175,574
Expense fund	416,077	409,634
Analyzed checking	50	50
Total Restricted cash	8,873,208	9,564,512
Total Cash	15,776,407	16,367,260
Accounts receivable		
Federal	0	0
Sales tax receivable	2,147	3,211
Total Accounts receivable	2,147	3,211
Prepaid and other assets		
Prepaid expense	19,554	19,554
Deferred charges	0	(3)
Total Prepaid and other assets	19,555	19,552
Total Assets	15,798,109	16,390,022

Lakeview Academy of Science, Arts and Technology
Balance Sheet - Board Report
02/01/2026 to 02/28/2026

	Current Month YTD DRAFT	Prior Month YTD FINAL
Liabilities and fund balance		
Liabilities		
Accounts payable		
Accounts payable	1,142,500	894,649
Purchasing liabilities	10,719	12,621
Total Accounts payable	1,153,219	907,270
Other current liabilities		
Accrued salaries and wages	443,606	375,206
Accrued withholdings	1,014	472
Deferred revenue	421,241	421,241
Total Other current liabilities	865,860	796,918
Total Liabilities	2,019,079	1,704,188
Fund balance		
Beginning fund balance	24,744,856	24,744,856
Net income	(10,965,826)	(10,059,022)
Total Fund balance	13,779,030	14,685,834
Total Liabilities and fund balance	15,798,109	16,390,022

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
Net Income (Loss)						
Revenue						
002 Local Revenue						
005 Interest Income	484,639	526,000	92.14%	35,835	42,201	49,335
006 Activities - After School Programs	52,266	65,665	79.59%	6,504	3,521	18,560
008 Student Fees-Secondary (not K-6)	36,956	11,000	335.96%	1,923	469	9,601
009 Local Donations	45,267	44,300	102.18%	1,857	1,624	1,500
010 Income- Sales & Rentals	9,433	10,000	94.33%	1,917	1,315	656
011 Other Local Income	1,111	450	246.99%	61	8	152
012 Lunch Fee Student	126,569	145,000	87.29%	17,097	13,287	14,019
013 Lunch Fee Non Student	661	1,000	66.11%	105	113	77
014 Other Food Related Income	50	50	100.00%	35	-	-
Total 002 Local Revenue	756,952	803,465	94.21%	65,334	62,539	93,901

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
021 State Revenue						
022 Regular School Programs K-12	3,195,216	4,553,973	70.16%	371,015	371,415	371,527
024 Educator Salary Adjustment	491,823	744,605	66.05%	60,905	60,905	60,905
025 Class Size Reduction K-8	296,397	475,501	62.33%	34,448	34,448	34,448
026 Charter School Administration	99,403	137,885	72.09%	10,110	10,110	10,110
027 Charter- Local Replacement	2,725,837	3,867,448	70.48%	318,962	318,962	318,962
028 Special Education	505,898	758,488	66.70%	63,208	63,208	63,208
030 Students At-Risk	72,159	105,515	68.39%	9,020	9,020	9,020
031 Student Health and Counseling	27,390	53,937	50.78%	-	13,672	-
032 Teaching & Learning	223,397	182,591	122.35%	-	14,579	(42,752)
033 BTS Arts	17,947	27,490	65.29%	2,243	2,243	2,243
034 School LAND Trust Program	164,636	164,636	100.00%	-	-	-
035 Teacher & Student Success	209,629	254,202	82.47%	26,204	26,204	26,204
036 Teacher Salary Supplemental Program	25,530	38,295	66.67%	3,191	3,191	3,191
037 State Prevention Programs	5,000	5,000	100.00%	-	-	-
038 Other State Revenue	298,832	497,157	60.11%	30,979	32,112	30,979
039 Lunch-State Liquor Tax	38,769	100,000	38.77%	7,608	5,917	6,092
Total 021 State Revenue	8,397,865	11,966,723	70.18%	937,893	965,985	894,136

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
071 Federal Revenue						
072 IDEA B- Disabled	49,323	163,522	30.16%	-	49,323	-
074 Title I Disadvantaged	16,845	35,150	47.92%	-	16,845	-
075 Title II Teacher Improvement	-	6,549	-	-	-	-
076 Title IV Student Support	10,000	10,000	100.00%	10,000	-	-
078 National School Lunch Program	73,719	175,000	42.13%	13,626	11,383	11,807
073 ESSER CARES Program	831	-	-	-	-	-
Total 071 Federal Revenue	150,718	390,221	38.62%	23,626	77,551	11,807
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	9,305,535	46,941,293	19.82%	1,026,853	1,106,075	999,844

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
Expense						
102 Salaries 100						
103 Wages-Business Admin & Support	110,600	171,742	64.40%	13,250	13,250	13,250
104 Wages-Principals & Directors	247,744	386,365	64.12%	31,632	31,507	29,007
105 Wages-Instructional Support	180,589	292,625	61.71%	21,385	21,385	21,385
106 Wages-Teachers	2,529,799	3,748,647	67.49%	344,447	353,161	283,896
107 Wages-Teachers-Special Ed	161,290	261,701	61.63%	22,220	22,220	17,542
108 Wages-Substitute Teacher	90,193	150,000	60.13%	20,021	7,251	14,403
109 Wages-Support Services Students	147,753	212,839	69.42%	20,880	18,251	20,051
110 Wages-Admin Support Staff	105,078	162,798	64.55%	14,461	10,583	12,829
111 Wages-Aides & Paraprofessionals	613,975	967,988	63.43%	88,301	50,706	70,725
112 Wages-SpEd Aide & Paraprofess	202,186	359,964	56.17%	31,648	17,667	22,278
113 Wages-Maintenance	116,340	224,288	51.87%	14,092	9,929	12,908
115 Wages-Food Services	117,465	182,271	64.45%	15,079	11,389	13,871
Total 102 Salaries 100	4,623,012	7,121,228	64.92%	637,416	567,298	532,147
121 Benefits 200						
122 Retirement Programs	221,878	392,689	56.50%	30,446	30,514	30,406
123 Social Security & Medicare Tax	293,593	533,575	55.02%	41,452	36,085	39,140
124 Health Benefits	583,502	1,181,377	49.39%	63,160	77,295	69,459
125 Workers Comp	11,149	11,877	93.87%	972	972	972
126 Unemployment Insurance	3,993	13,950	28.62%	542	472	314
127 Other Employee Benefits	(248)	-	-	(14)	(14)	(28)
Total 121 Benefits 200	1,113,868	2,133,468	52.21%	136,558	145,323	140,264

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
131 Purchased Prof & Tech Services 300						
132 Management & Business Services	15,200	23,000	66.09%	1,900	1,900	1,900
133 Instructional Services	32,399	7,000	462.84%	450	-	550
134 Employee Training & Development	3,954	25,900	15.27%	1,445	1,175	-
135 Contracted Professional Services	137,087	225,750	60.73%	20,135	21,507	18,714
136 Administrative Support Services	160	5,000	3.20%	28	132	-
137 Computer and Tech Services	44,262	81,375	54.39%	5,794	5,344	5,344
138 Legal and Accounting	91,691	35,000	261.97%	-	-	-
139 Other Purchased Services	26,279	37,100	70.83%	4,026	1,399	784
Total 131 Purchased Prof & Tech Services 300	351,033	440,125	79.76%	33,778	31,456	27,291
151 Purchased Property Services 400						
152 Utilities Expenses	39,607	61,600	64.30%	4,630	4,762	4,893
153 Repair & Maint- Comp & Tech	7,482	20,000	37.41%	-	-	5,600
154 Repair & Maint- Facilities	48,517	355,000	13.67%	2,110	8,486	8,975
155 Repair & Maintenance - Other	-	5,000	-	-	-	-
156 Lease- Rent Expense	2,960	5,000	59.19%	-	-	-
Total 151 Purchased Property Services 400	98,566	446,600	22.07%	6,741	13,249	19,468
171 Other Purchased Services 500						
173 Insurance Expense	43,400	44,550	97.42%	-	-	-
174 Telephone & Internet	3,959	5,000	79.19%	913	464	397
176 Postage & Mailing Expense	1,438	3,000	47.94%	250	378	157
178 Copy and Print Services	660	5,000	13.19%	-	244	18
179 Advertising- Administration	3,529	10,000	35.29%	2	1,268	1,173
180 Travel- Staff Travel & Mileage	8,653	5,300	163.26%	906	532	118
181 Travel- Field Trips	35,025	85,000	41.21%	7,949	3,532	6,055
Total 171 Other Purchased Services 500	96,664	157,850	61.24%	10,019	6,418	7,919

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
191 Supplies 600						
192 Classroom	200,428	320,000	62.63%	43,274	10,228	17,092
193 Enhancement Supplies	7,665	22,000	34.84%	1,453	917	726
194 Employee Motivation	24,175	50,000	48.35%	1,546	1,737	4,457
195 Employee Training Supplies	15,540	18,500	84.00%	-	402	402
196 Special Education	-	2,500	-	-	-	-
197 Administration Supplies	21,300	23,400	91.02%	1,791	960	1,228
200 Maintenance & Custodial Supplies	44,520	75,000	59.36%	6,383	6,607	7,596
202 Energy-Electricity & Natural Gas	85,598	143,990	59.45%	11,395	13,171	10,380
203 Textbooks & Instructional Software	31,633	225,000	14.06%	-	-	170
204 Library Books & Supplies	10,605	11,000	96.41%	1,350	357	2,570
205 Computer and Tech Supplies	203,265	350,000	58.08%	7,962	90,342	5,611
207 Parent Organization Supplies	1,637	9,000	18.19%	-	-	-
208 Student Program Supplies	5,704	12,500	45.63%	24	135	706
209 Student Motivation Supplies	2,517	12,000	20.98%	-	746	662
212 Lunch Program Supplies	127,001	217,313	58.44%	17,102	22,298	14,682
Total 191 Supplies 600	781,589	1,492,203	52.38%	92,280	147,899	66,282
221 Property (Equipment) 700						
222 Land & Site Improvement	21,465	-	-	-	21,465	-
223 Buildings	11,732,467	21,005,452	55.85%	1,016,865	1,137,332	953,978
224 Equipment- Instruction	-	100,000	-	-	-	-
227 Equipment- Facilities	178,960	-	-	-	29,320	137,075
Total 221 Property (Equipment) 700	11,932,891	21,105,452	56.54%	1,016,865	1,188,117	1,091,053

Lakeview Academy of Science, Arts and Technology
Income Statement - Board Report
02/01/2026 to 02/28/2026
66.67% of the fiscal year has expired

	Actual YTD	Original Budget	% of Budget YTD	Current Month DRAFT	Prior Month FINAL	Two Months Prior FINAL
241 Other Objects 800						
242 Dues and Fees	16,857	25,000	67.43%	-	667	-
243 Interest Paid- Loans	819,831	1,544,217	53.09%	-	-	-
244 Principal Paid- Loans	360,000	11,825,000	3.04%	-	-	-
245 Other Debt Service Fees	77,050	650,000	11.85%	-	5,500	5,500
246 Contributions pass through	-	150	-	-	-	-
Total 241 Other Objects 800	1,273,739	14,044,367	9.07%	-	6,167	5,500
Total Expense	20,271,361	46,941,293	43.18%	1,933,656	2,105,927	1,889,924
Total Net Income (Loss)	(10,965,826)	-	-	(906,804)	(999,852)	(890,079)



Quarterly Report

for the Lakeview Academy
Business Office
Q2, Fiscal Year 2026 (October—December)

Aegis Business Resources, LLC provides valuable training resources and accountability support to assist schools with successful business office operations. Aegis resources, such as the To-Do List (with linked training materials found in the Uneti Tree Library), help business administrators (BAs) to be aware of upcoming deadlines and have the resources and tools to meet them. When used properly, the resources provided by Aegis help schools to complete tasks on time, complete, and accurately.

The second quarter of the fiscal year (October through December) continues to be busy in the business office. Final Audited Financial Reports are issued, most of the state required reports on prior year performance, as well as submission of current year restricted program funding applications, were all due this quarter.

This quarter, our support and review work focused on these main areas:

- HR training on things such as progressive discipline and termination processing.
- Year-end tax reporting (W-2, 1099, and 941 forms) with training provided on the new IRS Form 1099 process.
- Support on state reporting: UPEFS, DMI, Transparency, submittal of plans for restricted programs.
- Development and training on the monthly scoreboard, annual scoreboard, and ratio reports to better report financial data and key performance indicators in a more consolidated format.
- Time and Effort Certifications for restricted programs.
- Review of program accounting and analysis of budget impact.

This report also includes information on your school's utilization of our resources. We include reports on attendance by your BA(s) at Aegis training meetings, as well as tracking of tasks completed (self-reported by your business administrator(s)). This data can assist the board and administration in understanding the work performed by your business office staff and provides useful accountability data.

In addition to the support provided to the business office, see the available upcoming training opportunities and resources for your board and administration at the end of this report.

Quarterly Review Cycle

Fiscal Year	July 1-June 30
2 nd Quarter	October - December
Quarter Close	The Business Office works with Aegis to close the 1 st quarter during January/February. (January is a hectic month)
Submission to Aegis	The Business Office submits final data to Aegis two weeks before the March board meeting
Aegis Review/Report	Aegis staff review identified criteria (on a sample basis), reporting findings and other relevant data to the school.



Mandee Thompson
President

Q2 Financial & Business Office Report



This review is not an audit and is performed on a sample basis per our Agreement. Sampling is defined as a technique used to discover information about a population (accounting records) by selecting and examining a small proportion of that population, and containing the characteristics of the larger population. Please keep in mind that the school's accounting records are in an interim state at this point in the school year. This means that it is within industry norms to identify transactions needing correction and/or for the reclassification of transactions to make the books reflect what actually happened—to make correcting entries as legally allowed and appropriate. **Green = OK Yellow = In Process Red = Needs Attention**

Review Item	Review Analysis	
Reviewed payroll tax payments to validate payments were made prior to the deadlines and assigned to the correct tax quarter.	SUTA, State and Federal with payroll taxes were all filed and paid on time for the quarter.	Green
Reviewed sample of time and effort certifications for IDEA and SpEd Add-On	PARS for the selected employees align with payroll data and have the required signatures, with the exception of the PARS for December that are missing the supervisor signature.	Yellow
Restricted Program Review: Identified programs with carry forward balances and reviewed all restricted program expenditures for alignment with the USBE approved budgets. Analyzed expenditure trajectory for utilization of funds by year end. Identified programs that would require deferral of any unutilized funds and as compared to the budget. Do they appear to be balancing with expenses aligned to the proper budgeted categories?		
Reviewed for any negative account balances. These are generally due to an automated software process allocating benefits to programs that can sometimes result in small negative balances to be corrected.	There are a few accounts with very small negative balances that should clear before year-end.	Yellow
State Special Education Add On (1205)	Expenses are in alignment with the budget and on track for full utilization of program funds. Confirmed there are no unallowed director expenses.	Green
State Special Education Self Contained (1210)	Expenses are in alignment with the budget and are on track for full utilization of program funds.	Green
State Special Education Extended School Year (1220)	Expenses are in alignment with the budget and are on track for full utilization of program funds, including the PY carryover.	Green
State Special Education - State Programs (1225)	Expenses are in alignment with the budget and are on track for full utilization of program funds.	Green
IDEA (7524/7522)	The approved plan is only for the initial allocation. Expenses are in alignment, but will need to be reviewed with the subsequent plan approval for the remaining funds.	Yellow
State Special Education Extended Year Stipends (1278)	The PY carryover needs to be returned to the state, but is awaiting direction from the USBE.	Yellow



Q2 Financial & Business Office Report - Continued



Green = OK Yellow = In Process Red = Needs Attention

Review Item	Review Analysis	
At-Risk Add On (5344)	The expenses are in alignment with the budget and are on track for full utilization of program funds.	Green
Gifted and Talented (5331)	This plan was recently approved. The budget will need to be updated and expenses allocated.	Green
K-3 Reading Software License (5618)	Expenses are in alignment with the budget and program funds are fully expended.	Green
Charter School Local Replacement (5619)	10% Facility use requirement met. Any remaining funds in this program will be transferred to general program funds at year end.	Green
Charter School Start-Up (5846)	This is the second and final year for the start-up funds. Expenses are in alignment with the budget. These funds will be fully utilized this year.	Green
School Land Trust (5420)	Expenses are in alignment with the approved plan. The planned tech expenses are in process. The program funds will be fully utilized by year-end	Green
Suicide Prevention (5674)	While there were no program expenses as of the end of Q2, the program was fully expended in Q3.	Green
Educator Support Professional Bonus	This program was fully expended with partial reporting shown in fund 4.	Green
Teacher & Student Success Program- TSSA (5678)	While expenses to align with the approved plan, program funds will not be fully utilized. The school will likely utilize the fiscal flexibility transfer to un-restrict the balance.	Yellow

Schools receive funding from many state and federal programs that are restricted for specific purposes. The director, key department heads, and the business office (indeed, anyone spending the school's funds) must know what is allowable and unallowable in each program. It is imperative that appropriate school staff attend relevant USBE/state meetings and apply what they learn to ensure program administration, documentation, and spending are in compliance with [ever-changing] program guidance/regulations. Often, changes are made known to schools at these meetings, and sometimes in obscure ways.

Q2 Financial & Business Office Report - Continued



Green = OK Yellow = In Process Red = Needs Attention

Review Item	Review Analysis	
Student Health & Counseling (5679)	Expenses are in alignment with the approved plan and are on track for full utilization of program funds.	Green
Educator Salary Adjustment (5876)	Expenses are trending a little low. The benefits calculation by USBE is high vs. actual expense. The school will likely provide additional stipends for staff to utilize these funds.	Green
Digital Teaching & Learning (5655)	Expenses are in alignment with the approved plan by category, but will require a budget amendment to adjust amounts by category. Expenses are on track for full utilization of program funds. This will be the last year for this program.	Yellow
School Safety and Support (5914)	While there were no program expenses as of the end of Q2, most of these program funds were fully expensed in Q3. The remaining funds will be fully utilized by year end.	Green
E-Cigarette (5673)	While there were no program expenses as of the end of Q2, these program funds were fully expensed in Q3.	Green
Smaller state programs Teacher Materials, etc.	Expenses are in alignment with the budget and are on track for full utilization of program funds.	Green
Salary Supplement for Highly Needed Educators (SSHINE), formerly TSSP (5807)	The PY TSSP balances rolled into the new SSHiNE program. Educator stipend amounts are determined by a required LEA policy. The PY carryover will be carried over again. Nicole is looking into utilizing the carryover balance.	Yellow
Beverly Taylor Sorenson Arts (BTS Arts) (5882)	Expenses are in alignment with the budget, but are trending a little low. Nicole is reviewing this program.	Yellow
Educator Professional Time (5651)	Expenses are in alignment with the budget and the program funds have been fully expended.	Green
Fiscal Flexibility (5390)	30% of the current year allocation for certain state restricted programs can be transferred here to used for any unrestricted purpose. The COVID use restriction is no longer in effect.	Green
Food Service Program -	Expenses exceed the available resources, including the PY carryover. The school will likely need to increase lunch prices to help offset expenses in future years.	Yellow
Title I (7801)	Expenses are in alignment with the approved plan and are on track for full utilization of program funds.	Green
Title II (7860)	This plan is still pending approval by the USBE. Most of the funds have already been expended in alignment with the anticipated plan approval.	Yellow
Student Support Services (7905)	Expenses are in alignment with the budget and are on track for full utilization of program funds.	Green



Training & Accountability Reporting



Training—Business Administrator Meetings

These meetings are hosted by Aegis and are scheduled on the second Wednesday of each month. Training is geared toward the upcoming To Do tasks and state reporting. Additionally, we provide training modules on the varied ongoing responsibilities of the business office, including sharing best practices for helping each school's business office run more effectively. Attendance for your school's BA(s) is found in the table at right. Meetings will be held:

- March 25, 2026
- April 8, 2026
- May – No Meeting (End of year accounting cleanup support and USBE Spring Finance Meeting)

Accountability Reporting

Monthly BA Meeting* Attendance	
October	
November	
December	

*Monthly meetings are recorded

2 st Quarter To Do Items*	
LandTrust prior year expense report.	
Submittal of (AFR) and (APR) reports to UPEFS.	
Initial budget review after October 1 student membership count.	
Quarterly review and close of financial records.	
Transparency & Capital Outlay Reports	
Quarterly payroll tax reporting.	
Utah Grants application process completed.	
Review of program expenses after approval of grant applications.	
IRS 990 Tax form completed	
Title I - Desktop Monitoring	
Audit employee deductions after new benefit plan period begins.	
Bond Compliance	
Submittal of Audited financials to USBE & State Auditor	
Excess Costs Reporting (Special Education)	
Indirect Costs Module (UPEFS)	
Prep for 1099 & W2 reporting	

*Note: Self-reported by BA staff using Aegis Intranet site



A Medley of Motions

- "I move to vote on..."
- "I move to amend the motion by..."
- "I move to rescind my motion."
- "I move for reconsideration of..."
- "I move to divide the question..."
- "I move to limit/extend the time for debate..."
- "I move to table...or un-table"
- "I move to nominate..."
- "I move for a recess..."
- "I move to adjourn the meeting at 9:00 P.M."
- and...
- "Point of order—chair..." then ask a question of the chair.
- "Point of information—chair..." then present information.



Lakeview Academy Board of Trustees Meeting
March 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

BEGIN TIME: 7:01PM

END TIME: 8:15PM

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

ONLINE: Daniel Dunn

ABSENT:

Community Members: Stephanie Frome, Brandon Johnson

2. Pledge of Allegiance

3. Reports

a. Board Committee Reports

i. Policy Committee

Efforts will begin to recruit interested parents to join the committee. A newsletter announcement will be used to call for volunteers, targeting evenings (Tuesday or Thursday) to accommodate availability. Michael Hinkley will collect emails. The Board recommends 1-2 faculty members to be on the policy committee. Committee guidelines and structure documents will be shared with Michael to assist in outreach and organization.

ii. Expansion Committee

The expansion project is progressing on schedule and on budget with hopes for fewer change orders going forward.

1. Financing Options additional discussion

David Robertson explained a direct placement financing model relying on the school's existing Moody's investment grade rating, avoiding a public bond offering. This approach offers callable bonds starting year one or two, allowing early debt prepayment if funds allow. Key milestones include Finance Authority approval on March 27th, financing application submission in early April, and final closing targeted for June 2026 to maintain audit and fund balance continuity.

Contingency plan for direct placement falling through is to ensure a public bond offering, which would

potentially push closing to July 2026. This backup plan ensures project funding continuity despite possible procedural delays.

2. Review information from financial advisor

The reimbursement agreement was discussed. Bond Counsel, Brandon Johnson, detailed the reimbursement resolution, which allows the school to reimburse itself for expenses incurred before bond closing using bond proceeds. This resolution is a federal tax requirement tied to the tax-exempt status of bond interest, ensuring compliance and preserving favorable interest rates. The school can reimburse up to a maximum bond amount (around \$3.5 million) for eligible expenses paid within 60 days prior to adoption. While the resolution is a formality, it provides financial flexibility if closing occurs after project expenses start.

iii. Financial Audit Committee

Nothing to report. The committee needs to look at IT and Speech & OT contracts to prepare RFP.

b. Director's Report

The administration shared enrollment projections for the next school year as positive, with active registration and waitlists growing, supported by ongoing outreach and lottery participation.

March is Literacy month. Activities have engaged students in reading challenges. The goal is 500,000 minutes collectively. The incentive is a bounce house party at the end of the year for reaching the goal.

i. Gifted and Talented Application

The school submitted its annual gifted and talented application to secure state funding used primarily for advanced math teacher salaries in middle school. Advanced placement students identified based on assessment tools like IXL to ensure appropriate placement and supporting graduation goals. This compliance effort supports program integrity and funding continuity.

c. Board Member's Reports

i. Board Retreat Update

Invitations sent to a select group of experienced facilitators target a well-managed retreat to advance strategic priorities. The board seeks to include diverse perspectives in facilitator evaluation to ensure a good fit and broad support. Cost proposals are pending and will be shared with administration for budgeting and scheduling coordination. The board asked the administration to be involved in the retreat.

ii. CAP report and assignments

No discussion.

iii. Board Election Process

The board addressed governance protocols, election procedures, and operational efficiencies to enhance oversight and engagement. The board discussed previous election processes involving parent candidate solicitation, vetting, and online voting via Qualtrics or SurveyMonkey sent to parents by administration. The bylaws allow flexibility in designing the election process. Aaron Glass was assigned by Ashley Hintze to help

develop a qualifications checklist and advise on the election logistics to strengthen participation and transparency.

- d. January 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

Business Manager reported that cash on hand remains strong despite typical January year-start activity including W2s and quarterly reporting. Some income statement anomalies were noted, such as marquee replacement costs and new playground installation expenses, with ongoing review of administrative supply allocations. The state charter school board updated financial metrics, prompting a scoreboard format change starting next month for clearer compliance reporting.

No public comment.

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

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

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 Public comment.

5. Public Hearing
 - a. LVA Club & Athletics Fees & Spending Plan 2026-2027

The director showed an updated spreadsheet and highlighted the adjustments from the prior year. The second public hearing reviewed updated sports and club fees reflecting increased league charges and adjusted spending plans. Administration discussed place holder for middle school field trip fees as a place holder for field trips not covered by middle school fees, such as the drama club field trip.

A parent asked about families with financial hardships. The school does not have a formal scholarship policy. Families with financial need can request fee assistance informally through coaches or administration, with costs absorbed by the general fund or fundraising.

6. Consent Agenda

- a. Minutes February 12, 2026.

MOTION BY: Aaron Glass moved to accept the consent agenda.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

7. Action Items

a. Reimbursement Resolution

The board had no further discussion on reimbursement resolution. Formal resolution paperwork will be provided by Bond Counsel. The Board will approve the written resolution at a future meeting.

MOTION BY: Michael Hinckley moved to approve the reimbursement resolution.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

b. Financing for Expansion

The board had no further discussion.

MOTION BY: Tina moved to approve the direct placement if approved by the finance authority or if not approved, to move forward with the new public bond.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

c. Expansion Committee Signatory Authority

Due to committee member changes, the board expanded the signing authority to include active board members or employees on the expansion committee. This ensures continuity in signing financing documents and related contracts after current chair, Lindsay Condie, authority ends at project close. Rick, as director, already holds signing authority, and this update formalizes additional designated signers to streamline operations. Conflict of interest was discussed, but none was found. Signing authority applies to contracts and disbursements.

MOTION BY: Michael Hinckley moved to appoint Richard Veasey as the Expansion Committee Signature Authority.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

d. LVA Club & Athletics Fees & Spending Plan 2026-2027

No further discussion.

MOTION BY: Aaron Glass moved to approve the club & athletics fee spending plan for 2026-2027.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

e. Policy Committee Chair Appointment

The board was reminded of prior meeting discussion to have Michael fill this role.

MOTION BY: Aaron Glass moved to appoint Michael Hinckley as the Policy Committee Chair.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

f. Board Vacancy Appointment

Daniel Dunn noted his term expires in May 2026 and expressed willingness to continue serving pending board approval. The board plans to run a parent election for the open parent-elected seat in June 2026, using a process involving application submission, vetting, and a survey-based vote. Discussion confirmed that parent-elected positions require elections but may be appointed to fill unexpired terms.

MOTION BY: Aaron Glass moved to appoint Ashley Hintze as a board member effective with term ending June of 2027.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

g. April Meeting Date Adjustment

The board considered workload and reporting timelines to ensure sufficient preparation time for financial and planning reports. A new date maintains quorum requirement and allows for necessary decision-making in a timely manner. The board proposed the April board meeting be rescheduled to April 16th due to spring break and scheduling conflicts.

MOTION BY: Aaron Glass moved to approve the April board meeting date to be moved to April 16, 2026 at 7pm.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

8. 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.

No closed session.

9. Adjourn

MOTION BY: Ashley Hintze moved to adjourn.

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

No Vote: None

Abstain: None

MOTION PASSES 4:0

END TIME: 8:15PM

Draft

School LAND Trust Plan 2026-2027 - Lakeview Academy

Please Finish your Plan Submission

Saving Your Work:

- **Most sections autosave:** After completing a section, click on a blank screen area to save.
- **Some sections require manual save:** For the "Action Plan Steps and Expenditures" sections, you **must click "Save."**
- **Best practice:** Save your work in a separate document as a backup.

Important:

- Each goal needs at least one trust land expenditure.
- Clearly describe how funds will achieve each goal. Unclear or misaligned expenses will result in the plan being returned for edits.

At least one goal is required.

Goal #1

close

Councils will formulate concise and impactful student-centered, data-driven, and evidence-based goal statements. A goal statement should answer the question *"What specific academic outcomes will students achieve by the end of the upcoming school year as a direct result of the Land Trust Plan?"*

Example: *By the end of the school year, we will have 60% of K-6 students achieve Typical or Better growth in literacy skills as measured by the Acadience Reading EOY Pathways of Progress composite score.*

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 to improve overall reading performance by 1%.

Refer to [R277-4.77-4](#) for a list of priority academic areas. A council may, supported by a council's data discussion, include goals in other areas if priorities have been addressed, or another area is a priority of the local board.

Please **select only** the priority area/s that your data determines as an area of most critical academic need. For each academic priority selected, there **must** be a corresponding assessment or data tool in the Measurements section. *If academic areas are selected that don't have a corresponding measurement, the plan may be sent back for edits.*

Priorities

- College and Career Readiness (*secondary schools only*)
- English/Language Arts
- Graduation Rate Increase (*secondary schools only*)
- Mathematics
- Science

Other Academic Areas in Core Standards

- CTE (Career and Technical Education)
- Educational Technology/Library/Media
- Financial Literacy
- Fine Arts
- Health
- Physical Education
- Social Studies
- Technology

Measurements

close

Describe the data and/or other relevant indicators supporting the decision of the council to identify this academic area as a "most critical academic need."

What measurements will be used to indicate success? Limit the data sources to meaningful tools so that progress may be gauged. Please remember, for each academic area selected above, there must be a corresponding measurement.

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. Each student will complete a technology project that will be scored by the teacher and will be directly observed. This project can be for any content area, but must specifically include the use of technology to convey learned outcomes. This is a goal in our school charter and is also directly observed by the School Board.

Action Plan Steps and Expenditures

close

Action plan steps should be specific and clear on what is being purchased with School LAND Trust funds and how the steps support the goal. Please:

- List and number the specific steps.
- Write the School LAND Trust funding amount in parentheses at the end of each action step.

If implementing cross-curricular methods (using art to support a math goal) that do not have an assessment or data tool, explain how the method will be implemented in the action plan steps.

Example:

1. *We will hire a paraprofessional for reading groups. (\$10,000)*
2. *The paraprofessional will work with small groups of students to provide structured support in areas of reading that the students are struggling with.*
3. *We will purchase reading software to complement classroom literacy instruction. (\$5,000)*

1. Survey staff on needed technology using a google form survey

2. Purchase technology for student and teacher use based on the findings of the survey. This would include items such as chromebooks, laptops computers, TVs, Access Points, document

cameras, learning program licenses (IXL), computer carts, desktop computers, monitors, printers, 3d printers, filament, coding devices (arduino boards, hummingbird kits, coding mice, etc.), and other technology devices directly needed for charter goals. (\$75,000)

3. Train staff and students on how to use new technology. Innovative Coach will hold trainings on Friday to instruct teachers on new devices as needed. Students will be trained as part of their lesson plans. (\$20,700)

4. Plan and implement technology projects in grades 1-9. These projects will be specific to the grade and will require each student to use technology to demonstrate learning outcomes. Some projects will be coding lessons, google slide presentations, data analysis, video editing, AI projects, etc. Additionally, students will use the chromebooks and laptops to complete learning in Lexia and reading assessments.

5. Observe and record completion of this Charter goal

6. Measure student performance at BOY and EOY using Reading assessment (Acadience and IXL)

Action Steps and Expenditures must be saved manually using this button:

[SAVE ACTION PLAN STEPS](#)

Category	Description	Estimated Cost		
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	Steps 1-2	\$80,000.00	<input type="button" value="Edit/Cancel"/> <input type="button" value="Save"/>	<input type="button" value="Delete"/>
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	Steps 3 and 4	\$28,096.84	<input type="button" value="Edit/Cancel"/> <input type="button" value="Save"/>	<input type="button" value="Delete"/>
	Total:	\$108,096.84		

[Scroll to the top to add a goal.](#)

Goal #2

Goal Statement

Councils will formulate concise and impactful student-centered, data-driven, and evidence-based goal statements. A goal statement should answer the question *"What specific academic outcomes will students achieve by the end of the upcoming school year as a direct result of the Land Trust Plan?"*

Example:*By the end of the school year, we will have 60% of K-6 students achieve Typical or Better growth in literacy skills as measured by the Acadience Reading EOY Pathways of Progress composite score.*

Lakeview Academy will use staff members to improve student demonstration of science standards mastery during the 2026-2027 year.

Academic Area

close

Refer to [R277-4.77-4](#) for a list of priority academic areas. A council may, supported by a council's data discussion, include goals in other areas if priorities have been addressed, or another area is a priority of the local board.

Please **select only** the priority area/s that your data determines as an area of most critical academic need. For each academic priority selected, there **must** be a corresponding assessment or data tool in the Measurements section. *If academic areas are selected that don't have a corresponding measurement, the plan may be sent back for edits.*

Priorities

- College and Career Readiness (*secondary schools only*)
- English/Language Arts
- Graduation Rate Increase (*secondary schools only*)
- Mathematics
- Science

Other Academic Areas in Core Standards

- CTE (Career and Technical Education)
- Educational Technology/Library/Media
- Financial Literacy
- Fine Arts
- Health
- Physical Education
- Social Studies
- Technology
- World Languages

Measurements

close

Describe the data and/or other relevant indicators supporting the decision of the council to identify this academic area as a "most critical academic need."

What measurements will be used to indicate success? Limit the data sources to meaningful tools so that progress may be gauged. Please remember, for each academic area selected above, there must be a corresponding measurement.

Students will complete benchmark assessments on grade level standards using IXL software. Students have struggled to master each standard as they have been changed recently. The benchmarks will be used to help measure needed instruction, lesson effectiveness and student achievement.

Action Plan Steps and Expenditures

close

Action plan steps should be specific and clear on what is being purchased with School LAND Trust funds and how the steps support the goal. Please:

- List and number the specific steps.
- Write the School LAND Trust funding amount in parentheses at the end of each action step.

If implementing cross-curricular methods (using art to support a math goal) that do not have an assessment or data tool, explain how the method will be implemented in the action plan steps.

Example:

1. *We will hire a paraprofessional for reading groups. (\$10,000)*
2. *The paraprofessional will work with small groups of students to provide structured support in areas of reading that the students are struggling with.*
3. *We will purchase reading software to complement classroom literacy instruction. (\$5,000)*
 1. Hire staff to deliver science lessons on specific standards identified as in need. These staff will be paraprofessionals who will provide extension learning lessons to help students experience the content in a hands on learning strategy in compliance with our charter and best practices. (\$100,000)
 2. These staff members will meet with classroom teachers to plan lessons and review student performance data collected during the lessons and IXL.
 3. Lessons will be observed by administration to ensure effectiveness in achieving learning goals.

Action Steps and Expenditures must be saved manually using this button:

SAVE ACTION PLAN STEPS

Category	Description	Estimated Cost		
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	Steps 1 and 2	\$100,000.00	<input type="button" value="Edit/Cancel"/> <input type="button" value="Save"/>	<input type="button" value="Delete"/>
	Total:	\$100,000.00		

Scroll to the top to add a goal.

Summary of Estimated Expenditures

Category	Estimated Cost (entered by the school)
Technology related supplies < \$5,000 each - devices, computers, E-readers, flash drives, cables, monitor stands	\$80,000.00
Total:	\$208,096.84

Category	Estimated Cost (entered by the school)
Salaries and Benefits (teachers, aides, specialists, productivity, substitutes)	\$128,096.84
Total:	\$208,096.84

Funding Estimates – Please Update

Estimates	Totals	
Carry-over from 2024-2025	\$0.00	
Distribution for 2025-2026	\$164,636.13	
Total Available Funds for 2025-2026	\$164,636.13	
Estimated Funds to be Spent in 2025-2026	\$ 164636.13	<input type="button" value="Update"/>
Estimated Carry-over from 2025-2026	\$0.00	
Estimated Distribution for 2026-2027	\$208,096.84	
Total Available Funds for 2026-2027	\$208,096.84	
Summary of Estimated Expenditures for 2026-2027	\$208,096.84	
Estimated Carry-over to 2027-2028	\$0.00	

The Estimated Distribution is subject to change if student enrollment counts change.

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:

- Letters to policymakers and/or administrators of trust lands and trust funds
- Other: Please explain
- School assembly
- School marquee
- School newsletter or website
- Social Media

- Stickers that identify purchases made with School LAND Trust funds

Council Plan Approval

Please indicate the voting results to approve this school plan.

Number Approved:

Number Not Approved:

Number Absent:

Date:



Please attach relevant documents here. *If attaching data to support the Measurement section, please ensure it does not include any student data.*

Please submit comments below.

Comments are only seen by those involved in submitting or reviewing plans and cannot be edited or removed.

There is a 1000 character limit on the comments. SAVE button shows when entry is made. Character Count: 0

Review before Submission

Please review the following before submitting (once approved, this report is public):

- **Spelling & grammar**
- **There is no student or personal data**

Once submitted the report may only be revised through the review process by the LEA Reviewer or Charter (Business Administrator) Reviewer. Once the review is complete, the report may not be edited.

This form is ready for display on the public website. Spelling and grammar have been checked. There is no student data included.

[BACK](#)