

Lumen Scholar Institute Statement of Activities

Created on April 10, 2026
For Prior Month

| | Annual June 30, 2026 Budget | Year-to-Date March 31, 2026 Actual | % of Budget |
|-------------------------------|-----------------------------------|--|-----------------------|
| Net Income | | | |
| Income | | | |
| Revenue From Local Sources | 60,000 | 99,219 | 165.4 % |
| Revenue From State Sources | 5,595,166 | 4,248,219 | 75.9 % |
| Revenue From Federal Sources | 95,867 | 0 | 0.0 % |
| Total Income | <u>5,751,033</u> | <u>4,347,438</u> | <u>75.6 %</u> |
| Expenses | | | |
| Instruction/Salaries | 3,474,078 | 2,164,475 | 62.3 % |
| Employee Benefits | 565,670 | 329,022 | 58.2 % |
| Purchased Prof & Tech Serv | 454,466 | 388,056 | 85.4 % |
| Purchased Property Services | 75,547 | 43,322 | 57.3 % |
| Other Purchased Services | 188,126 | 115,889 | 61.6 % |
| Supplies & Materials | 614,573 | 232,541 | 37.8 % |
| Property | 72,650 | 0 | 0.0 % |
| Debt Services & Miscellaneous | 150,978 | 116,466 | 77.1 % |
| Total Expenses | <u>5,596,088</u> | <u>3,389,771</u> | <u>60.6 %</u> |
| Total Net Income | <u>154,945</u> | <u>957,667</u> | <u>618.1 %</u> |

Lumen Scholar Institute
Statement of Financial Position
Created on April 10, 2026
For Prior Month

| | Period Ending 03/31/2026 <small>Actual</small> | Period Ending 03/31/2025 <small>Actual</small> |
|--|--|--|
| Assets & Other Debits | | |
| Current Assets | | |
| Operating Cash | 4,116,426 | 3,374,560 |
| Accounts Receivables | 1,215 | 7,099 |
| Total Current Assets | <u>4,117,641</u> | <u>3,381,659</u> |
| Net Assets | | |
| Fixed Assets | 969,851 | 941,307 |
| Depreciation | (622,794) | (439,287) |
| Total Net Assets | <u>347,057</u> | <u>502,020</u> |
| Total Assets & Other Debits | <u>4,464,698</u> | <u>3,883,679</u> |
| Liabilities & Fund Equity | | |
| Current Liabilities | 24,340 | 19,564 |
| Long-Term Liabilities | 22,645 | 154,145 |
| Fund Balance | 3,460,046 | 2,684,284 |
| Net Income | 957,667 | 1,025,686 |
| Total Liabilities & Fund Equity | <u>4,464,698</u> | <u>3,883,679</u> |



Proposed Panorama Partnership:

- Student Success + Solara AI
- Stakeholder Surveys
- Playbook
- Training and Professional Development
- Year Round Project Support

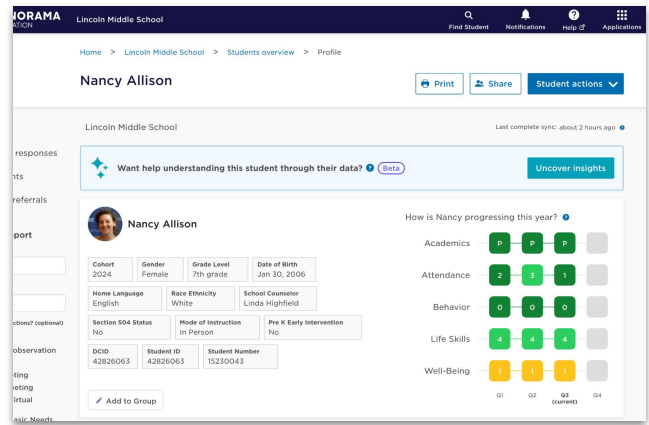
Panorama Student Success

Empowers Data-Informed Decision-Making

With student data and intervention workflows spread across multiple systems, it can be difficult and time-consuming to identify and respond to student needs. The evidence-based **Panorama Student Success** solution centralizes your MTSS data and workflows in one place to increase the efficiency of your decision-making and the effectiveness of your supports at every tier.

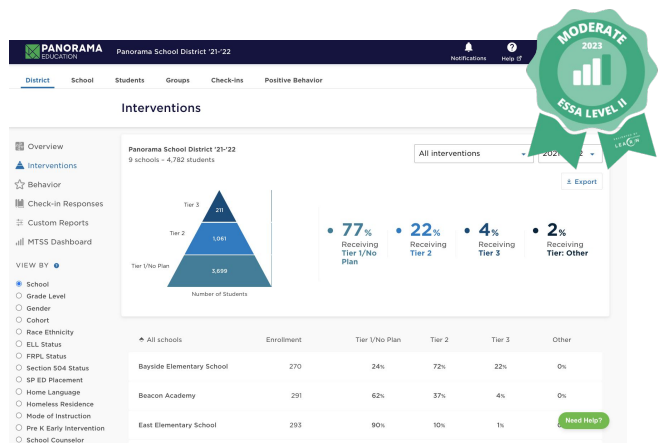
Unify your data for a comprehensive MTSS that supports the whole child

Bring academics, assessments, behavior, attendance, and survey data together in one platform. Nightly syncs ensure you have the most up-to-date and accurate information to inform decision-making and improve outcomes.



Research- and evidence-based strategies

Student Success offers classroom teachers intervention recommendations from Playbook, the trusted library of 900+ strategies exclusive to Panorama's district partners.



Panorama Solara

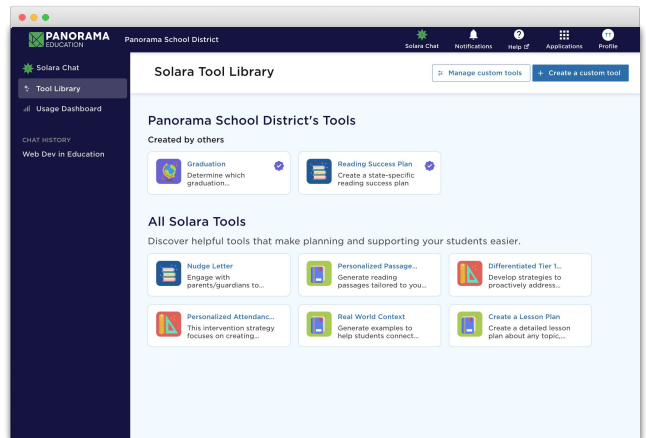
Powering Real Student Impact with AI

Panorama Solara is a leading K-12 AI platform built to streamline student supports while prioritizing data security and privacy. Configurable to your district's goals and practices, Solara fits seamlessly into your existing processes—so it works the way your district does.

Safe, private AI that you can trust With rigorous protections in place, your district's information is safe and never used to train AI models. Panorama fully complies with SOC 2, FERPA, and COPPA.

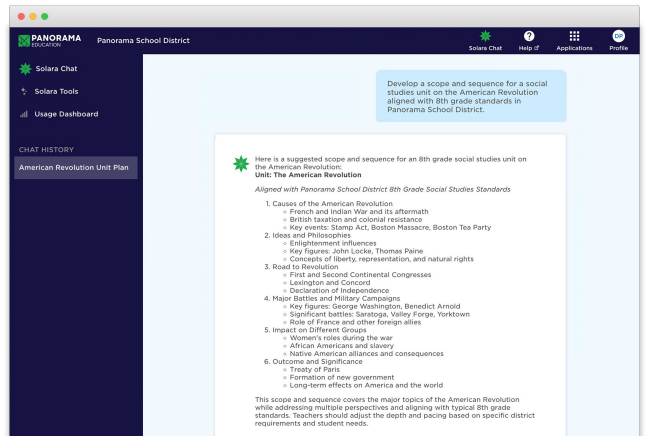
Create and Share Custom Tools

Access, edit, and manage reusable prompts and templates from one central hub. Educators manage personal tools, while authorized admins can publish or remove tools district-wide—helping teams work smarter to support district goals and student success.



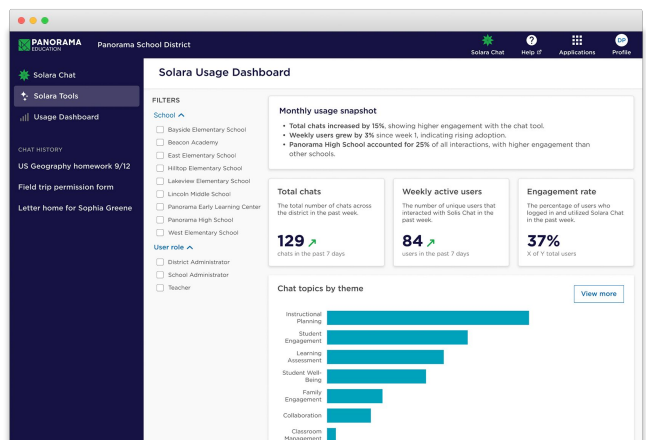
Research-Backed Tools to Enhance Teaching

Designed for K-12, Solara provides pre-built prompts and tools to create lesson plans, rubrics, grade-level texts, and more—saving time for meaningful student engagement. All prompts and tools can be configured to fit your district's unique needs.



Clear Visibility into AI Usage

Access detailed reports and analytics on AI activity in Solara, including the themes educators are searching for. Track trends to meet governance requirements and uncover insights to better support teachers, staff, students, and families.



Panorama Surveys and Engagement

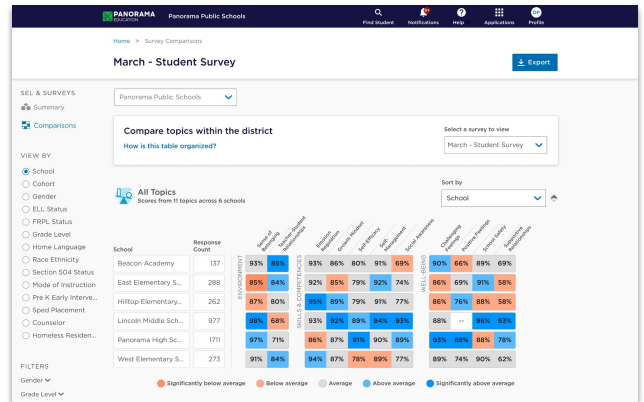
Drive School Improvement with Vital Feedback From Your Community

Panorama Surveys and Engagement is the leading K-12 platform for **gathering, analyzing, and acting on stakeholder feedback**. From benchmark surveys to pulse checks, districts can measure student, family, and educator experiences to drive strategic decisions that improve school climate, engagement, and student success.

With **research-backed surveys, advanced analytics, and intuitive reporting**, education leaders can uncover key insights, compare results with national benchmarks, and take targeted actions to enhance learning environments and track student success over time.

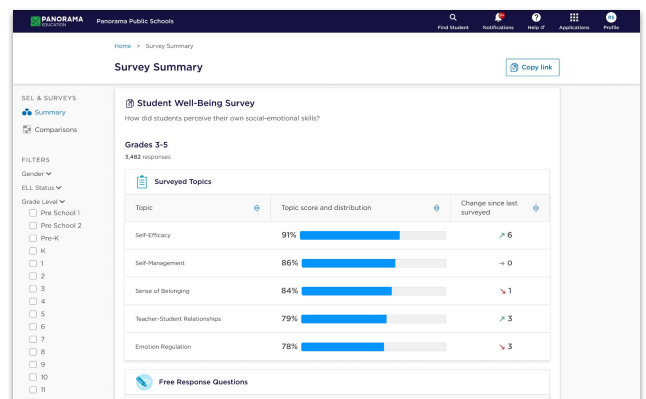
Enhanced Survey Reporting

Take your survey insights to the next level. Compare survey results to national benchmarks, pinpoint strengths and growth areas at the district, school, and classroom levels, and break down data by subgroups to uncover experience gaps—helping you make informed, data-driven decisions for real impact.



National and Peer Benchmarks

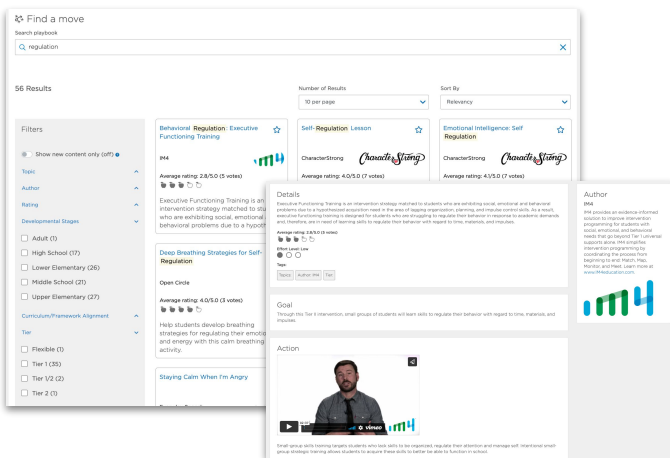
With the largest dataset of 1.5 billion K-12 survey responses, only Panorama can provide national and peer benchmarking to help you interpret your data with confidence. See how your students compare to peers and how your school or district measures up to similar communities.



Exclusive for Panorama Partners: Playbook

A Library of Academic, Behavioral, Attendance, and Intervention Strategies

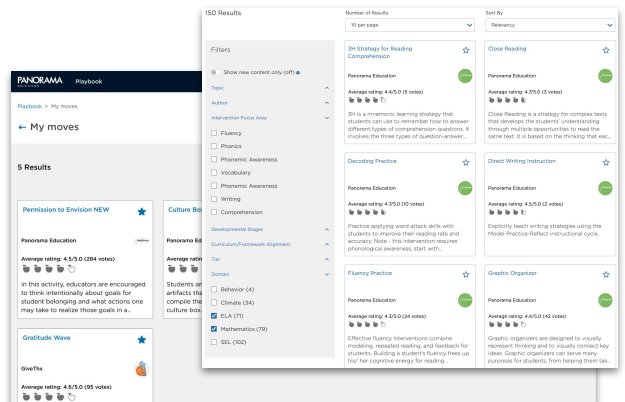
Playbook provides educators **1000+ research-based interventions** for students. It is designed based on educator feedback and user testing to ensure it makes the process of learning about how to deliver intervention strategies efficient and easy.



Explore **100+ behavior interventions** and narrow your focus by using Playbook's search bar and filters. Educators can filter by tier, developmental stage, framework alignment, and more!

This carefully **curates your library of interventions** and build educator capacity to approach behavioral supports through an asset-based lens.

Educators can explore **200+ academic ELA and Math interventions**. Save strategies to curate your go-to list of tried and true interventions focused on fluency, comprehension, computation, problem-solving, phonics, writing, and more. Educators benefit from easy-to-follow instructions to ensure interventions are carried out with fidelity.



Professional Learning with Panorama

Exceptional Learning Experiences

Panorama's professional learning services are rooted in research-based best practices for effective adult learning. Our team of experts designs our services to meet the unique needs of adult learners in each district and school.

At Panorama, we believe that **data is only as valuable as it is actionable**. Our professional learning experiences ensure that educators not only understand their data, but are equipped and inspired to take timely, supportive actions.

We take pride in building high-quality learning experiences that are grounded in adult learning theory, research, and best practices.

In collaboration with our school and district partners, we develop professional learning plans that drive investment and that move educators across the district into action as a united team.

About the Panorama Teaching & Learning Team

At our core, we are a team of educators. Each of our facilitators started their career directly serving students as teachers, counselors, and interventionists. Together, our team of over 30 accomplished educators has decades of combined experience, including in school and district leadership, special education, system improvement, MTSS, data-driven instruction, and curriculum development.



What you can expect from a partnership with the Panorama Teaching & Learning Team

- A learning plan aligned to your district or school's unique needs and context.
- Relevant and inspiring learning experiences featuring data insights that lead to action.
- A student-, family-, and community-first approach to data inquiry.



With Panorama, we're no longer guessing. We're asking the right questions to understand how to best help students

→ Learn more about [Jordan School District \(UT\)](#)



"I have a Success Coach who's been in the system for 30 years. She feels like a big weight has been lifted off her shoulders now that she has the ability to document progress a lot more clearly and easily."

→ [Spanish Fork Jr. High \(Nebo School District, UT\)](#)

→ [Hear more from our UT partners](#)

Student Success Professional Development Package

Sample Partnership Journey:



PANORAMA
EDUCATION

A Multi-Year Vision for Implementation and Growth in MTSS

Year 1: Build Foundation

Develop vision and build foundational practices and expectations for platform use, aligned to your MTSS Framework & key state legislation

- Partner with district leaders to build a vision for Student Success
- Identify early adopters to train and streamline intervention tracking
- Incubate processes and meeting structures to drive MTSS long-term
- Provide optional learning opportunities for users excited to engage

Year 2: Reflect & Refine

Reflect on Year 1 execution, establish goals for driving growth, and deepen usage and engagement with data.

- Synthesize learnings from Year 1 users to refine and strengthen rollout
- Clearly define role-specific expectations for tools and collaboration
- Facilitate role-specific training to deepen platform adoption
- View district dashboards to prioritize support for school teams

Year 3: Embed & Sustain

Embed Student Success in MTSS practices and surface best practices to share with school sites

- Identify and scale best practices across all schools in the district
- Design and implement professional learning communities
- Empower school sites to iterate on MTSS practices specific to their schools
- Continue to build, refine and share best practices in MTSS handbook

Strong Implementation with Consultative Support

Strategic Advising & Leadership Support

- District leader advising and implementation planning
- Guidance on best practices for goal-setting and action

End-User Training for Platform Adoption

- Navigating and interpreting Panorama survey results
- Customized, role-based workshops

Ongoing Implementation Tools & Support

- Dedicated project team to support ongoing rollout
- Playbook of intervention strategies and resources

Student Success & Surveys: Foundations (Virtual)

At Panorama, we believe that data is only as valuable as it is actionable. Our professional learning experiences ensure that educators not only understand their data, but are equipped and inspired to take timely, supportive actions.

This package includes 3 virtual workshops, consultation hours, and access to numerous asynchronous materials and resources.

| Package Component | Description |
|---|--|
| Three- 90 minute virtual sessions | <i>This virtual training is designed to effectively launch data inquiry and accelerate action planning with Panorama Student Success. A Panorama Teaching and Learning team member will partner with you to design meaningful learning experiences to help build and sustain capacity to navigate Panorama tools and respond to the results. See workshop sessions for a description of content options.</i> |
| Up to 3 hours with a Teaching & Learning team member | <i>These are consultative hours with a member of the Panorama Teaching and Learning team to support your district team with rollout, training, and embedding.</i> |
| Unlimited access to Panorama Academy | <i>Access to a rich resource library to provide just-in-time product support, implementation tools, and protocols for acting on data. These resources can also be printed as quick reference guides, shared with key users in the district, and bookmarked.</i> |

Implementation Timeline & Pricing: District Name

Proposed Pricing



| | | Details |
|---|--|---|
| <p>\$4000 per school (\$2,000 Reimbursed)</p> <p>Behavior Logging- \$2340</p> | <p>“Student Success” Early Warning & MTSS Platform</p> | <ul style="list-style-type: none"> • Ongoing integration of SIS & standard filters into Student Success platform. Includes behavior, attendance, coursework, rosters, and demographics • Ongoing integration of supported ELA, Math, and state assessments • Behavior Logging • Behavior analytics reporting • Intervention tracking • Surveys for Students |
| <p>\$1740 Staff \$1740 Family</p> | <p>Panorama Surveys</p> | <ul style="list-style-type: none"> • Survey administration (unlimited), analysis and reporting • Surveys for Staff & Families |
| <p>\$2000 per school</p> | <p>Solara</p> | <ul style="list-style-type: none"> • Panorama Solara is a purpose-built AI chat application designed specifically for K-12 districts. Panorama Solara includes access to chat application, and Panorama Playbook. |
| <p>\$1500 per session \$3,000 Total (1 covered by USBE)</p> | <p>Training & Professional Development</p> | <ul style="list-style-type: none"> • 3 Virtual train-the-trainer sessions for up to 50 participants (up to 2 hours) • Access to On-Demand Resources and Training Support (Panorama Playbook, Panorama Academy, Panorama Webinars) |
| <p>NA</p> | <p>Project Management</p> | <ul style="list-style-type: none"> • Dedicated Panorama support team who will work with the partner’s main point of contact to execute project timeline, support integration process, customize configurations, coordinate platform roll-out, and provide ongoing support |

Total Cost

Total: \$14,820

\$12,820

(after USBE Reimbursement)

Proposed Pricing: Min Pricing



Details

| | |
|--|---|
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Total Cost

Total: \$11,340

\$9,340

(after USBE Reimbursement)

Proposed Pricing: Min Pricing



Details

| | |
|---|--|
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Total Cost

Total: \$9,000

\$7,000

(after USBE Reimbursement)

Proposed Pricing: Min Pricing



Details

| | |
|--|--|
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Total Cost

Total: \$7,000

\$5,000

(after USBE Reimbursement)

Proposed Pricing: Min Pricing



Details

| | |
|--|--|
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| <p>Training & Professional Development</p> | <ul style="list-style-type: none">● 2 Virtual train-the-trainer sessions for up to 50 participants (up to 2 hours)● Access to On-Demand Resources and Training Support (Panorama Playbook, Panorama Academy, Panorama Webinars) |
| <p>Project Management</p> | <ul style="list-style-type: none">● Dedicated Panorama support team who will work with the partner’s main point of contact to execute project timeline, support integration process, customize configurations, coordinate platform roll-out, and provide ongoing support |

Total Cost

Total: \$5,500

\$3,500

(after USBE Reimbursement)

Proposed Pricing



Details

| | |
|--|--|
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Per School Cost

Total: \$3500

\$1750

(after USBE Reimbursement)

Panorama Partnership Timeline

Kickoff, Integration, and Initial Launch

| Action | Date | Description |
|---|-------------------------|---|
| Select a Project Scope | | |
| Board Submission | | <ul style="list-style-type: none"> Confirm funding & needed board approval |
| Board Approval | | <ul style="list-style-type: none"> Sole Source letter or standard board approval |
| Contract Executed | March 30 | <ul style="list-style-type: none"> Panorama and partner finalize project scope and both parties sign service order agreement. |
| Project Kickoff Call | Week of April 6 | <ul style="list-style-type: none"> Meet with Panorama project team to align on vision and goals. |
| Partner provides Panorama access to data systems | Week of April 6 | <ul style="list-style-type: none"> Partner technical team will provide Panorama with access via direct access or SFTP to SIS and supported assessments in order to meet integration timeline. |
| Integration | Week of April 6- May 18 | <ul style="list-style-type: none"> Panorama's technical team completes data integration and configuration Panorama will work with partner's technical team to troubleshoot any integration roadblocks |
| Preview for Leadership | Week of May 25 | <ul style="list-style-type: none"> Panorama will preview the Student Success platform for leadership Make adjustments and troubleshoot any feedback from partner team |
| Initial Launch | June 1 | <ul style="list-style-type: none"> Initial users gain access to Panorama. Panorama provides virtual training around platform navigation and action planning. |



PANORAMA
EDUCATION

About Panorama Education



Panorama Education is a leading education technology company that partners with K-12 schools and districts to help students succeed in the classroom and beyond. Founded in 2012, Panorama is the partner of choice for districts that want to implement AI safely and securely, elevate academic performance, improve attendance and behavior, and prepare students for graduation and life after school. Panorama's secure, research-backed software for AI, student support, and community voice and engagement provides educators with a unified view and actionable insights across academics, attendance, behavior, and well-being.

Through professional development and hands-on support, Panorama helps districts achieve their goals and deliver lasting impact. Today, Panorama supports 15 million students in 25,000 schools and 2,000 districts nationwide. Learn more at www.panoramaed.com.

24 School Street, 2th Floor
Boston, MA 02108
www.panoramaed.com



Governing vs. Managing

What's the Difference?



Source of Misunderstanding

Most boards consist of people with management experience.

These members often assume that governance is merely a kind of group management – parallel to the executive’s function but occurring at a higher level.

Misunderstanding Leads to Problems

- Ongoing board interference with management.
- Wasted time discussing the wrong things in board meetings.
- Administration continuously coming to the board for permission to do its job.



And More Problems



- Lack of clarity as to who is responsible for what – and especially when things go wrong.
- A culture in which individual board members think of themselves as the executive’s boss.
- Uneven results.



Intersection of Responsibilities

- The board and the executive must learn how to successfully navigate the intersection of governance and management.
- The relationship between the board and the executive is one of interdependence.
- The executive cannot hold the charter, and the board cannot run the school.

Ensuring

Boards need to ensure two things:

- That the school accomplishes the outcomes for which it was created;
- That the school avoids the things that should be avoided.





How Does the Board Ensure?

- The board defines the outcomes to be achieved by the school- according to the school's mission and vision.
- The board continuously evaluates how well those outcomes are being achieved.

A Little More About Ensuring

The job of ensuring has little to do with how things are going to be done except to ensure the the processes occur within appropriate policy and financial boundaries determined by the board.



Management Executes

Executing is about getting things done.

Executing is selecting and incorporating the best processes to achieve the mission and vision.

Executing answers an endless array of "how" questions.





Management “How” Questions

- How will the school day best be structured?
- How will teachers be recruited, evaluated, developed, and retained?
- How will curriculum and assessment products be selected, integrated, and implemented?
- How will the student code of conduct be established and enforced?
- How will the administrative team be structured?
- How will the school meet its technology demands?

The Board Hires an Executive to Determine “How”

The board hires an experienced education expert in its Executive Director.

The board delegates authority to that Executive Director to determine how the mission and vision are accomplished.

The board evaluates the Executive Director based on that expert’s performance in achieving the outcomes the board has set.





Board Oversight

- The board is responsible for financial goals and financial oversight.
- The Executive Director follows the board's financial directives by adhering to a board-approved budget and board-approved financial policies.
- The board also provides oversight on legal matters through policies and directives.
- The board and the Executive Director collaborate on finances and legal matters, but the board has the institutional authority on both through its policies and directives.

What the Board Should Avoid and Why



- The board should avoid discussing how something is done or is going to be done, or the process; the board is then managing and not governing.
- Every minute the board spends discussing a *how* question is a minute the board didn't spend discussing *how well* questions.
- When the board manages instead of governs, it diminishes its own ability to hold the executive accountable for the outcomes achieved or not achieved.

What the Board Should Do and Why

- The board should understand that it exists to govern – that the school cannot thrive, and in some cases, survive, without the board performing its governance role.
- The board should ensure that the right outcomes occur.
- The board should discuss questions that begin with “How well.”



Reflecting on Your Board Actions

- Does your board govern or manage the school?
- How much time has your board spent in your last three board meetings discussing processes versus outcomes?
- Does your Executive Director have examples of times when the board, or worse, an individual board member, has interfered with management?
- Has your board established governance policies focused on ensuring rather than executing?





Content Source

- Adapted from Brian Carpenter's *Charter Board University: An Introduction to Effective Charter School Governance, 2nd ed., 2007.*