

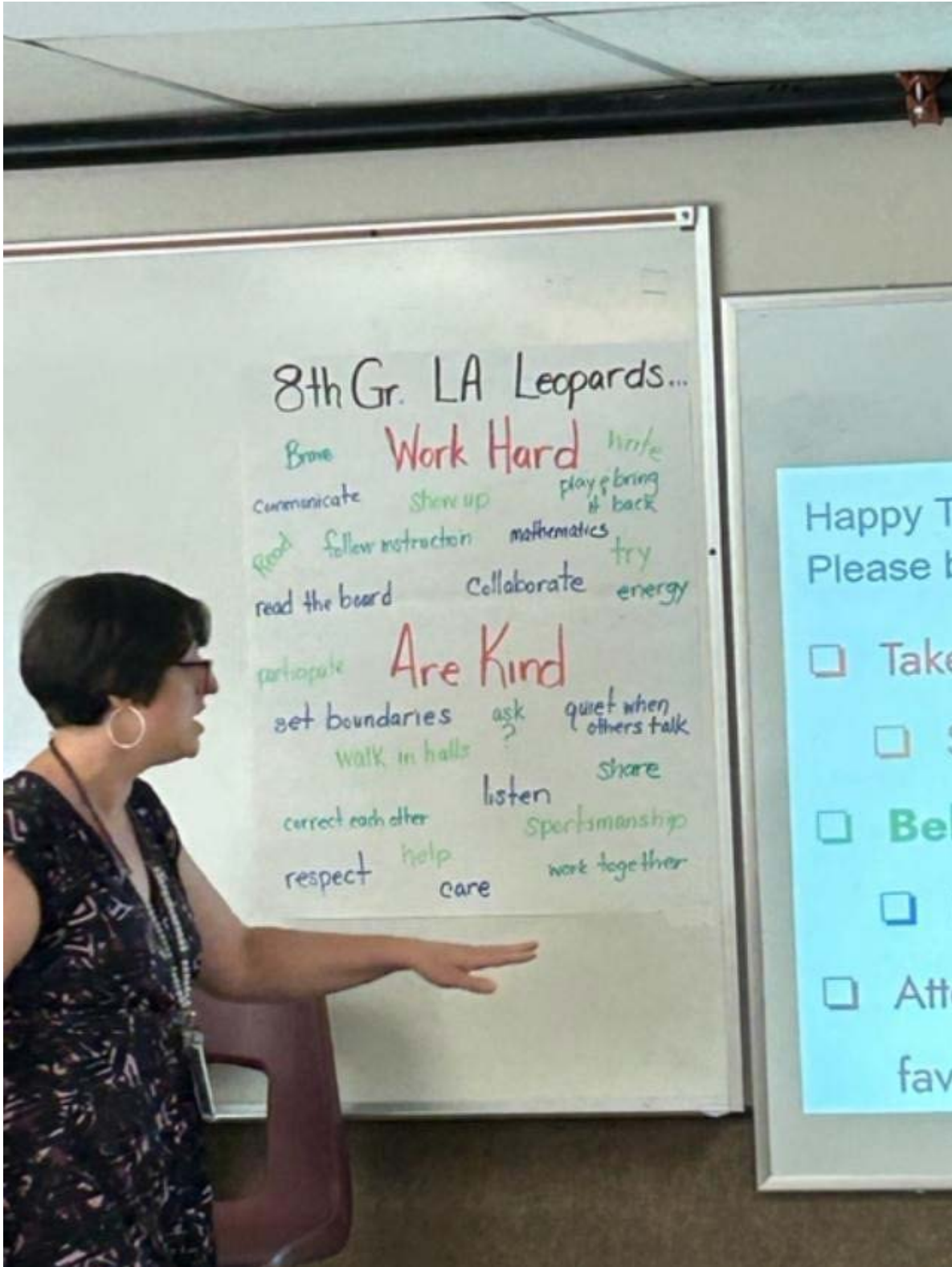
LINCOLN *Academy*



EXECUTIVE DIRECTOR REPORT

David Schoenhals
November 14, 2023

LEOPARDS WORK HARD AND ARE KIND!



STUDENT PERFORMANCE

<https://www.facebook.com/LincolnAcademyCharter/videos/1301974710458455>

We will watch a part of the band performance and then hear from Music Teacher Jessie Newsom virtually.

6TH GRADE DISSECTION DAY!



UNIFIED IMPROVEMENT PLAN

Paul Hurst and David Schoenhals

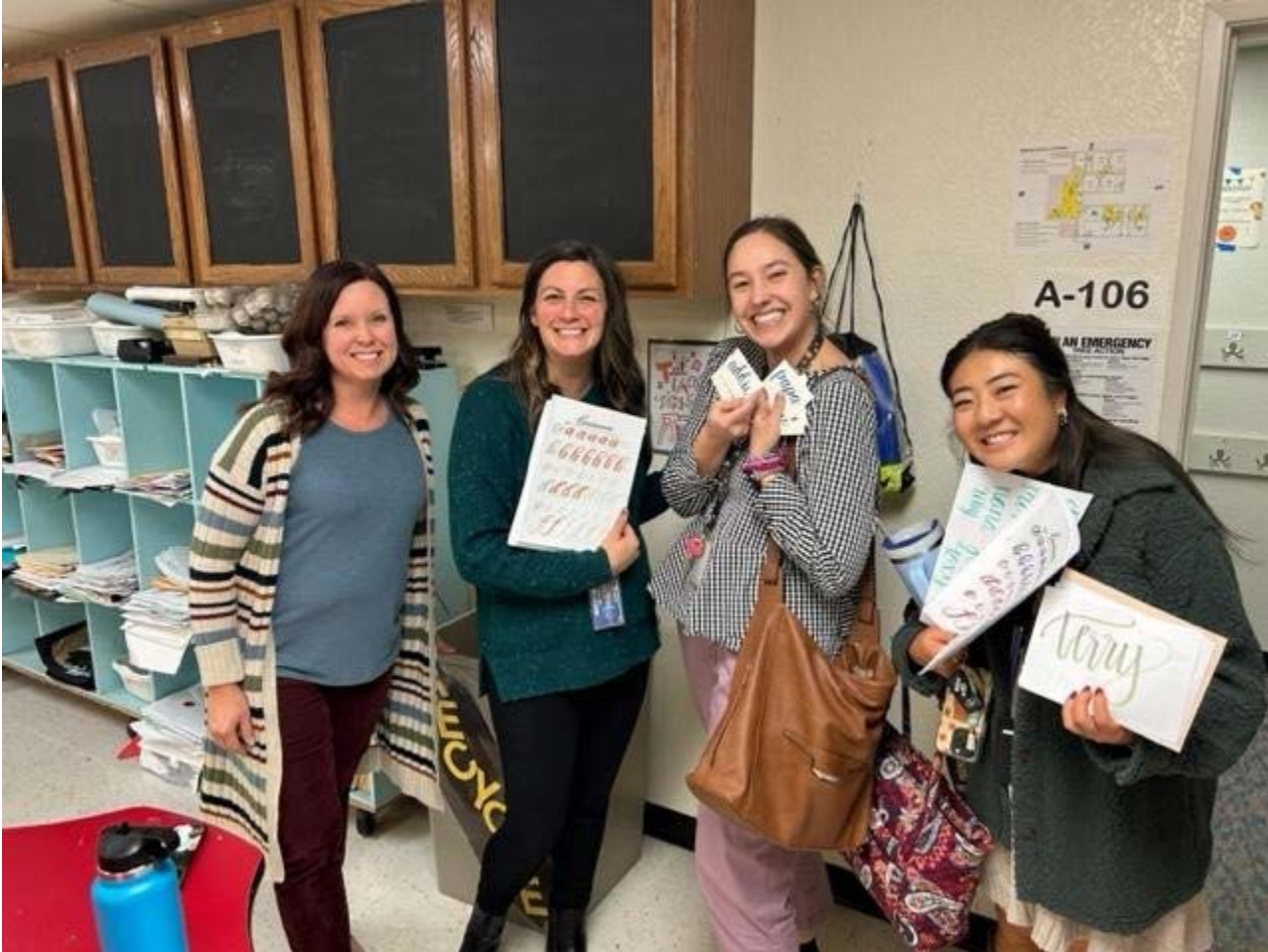
SEE ATTACHED DOCUMENT

Unified Improvement Planning was introduced in 2009 to streamline improvement planning components of state and federal accountability requirements. Based on the Colorado Achievement Plan for Kids (SB212-08), the primary purpose of improvement planning is to align efforts to: ***Ensure all students exit the K-12 education system ready for post-secondary education, and/or to be successful in the workforce, earning a living wage immediately upon graduation.***

Colorado schools and districts can improve student learning and system effectiveness by engaging in a cycle of continuous improvement to manage their performance. To support this purpose, the Education Accountability Act of 2009 requires each Colorado district and school to create an annual improvement plan.

The intent is that schools and districts create a single plan that has true meaning for stakeholders, ultimately reducing the total number of separate plans required. With that in mind, the Colorado Department of Education has developed a unified improvement planning template and processes to support schools and districts in their performance management efforts.

STAFF EXPERIENCE



SENSE MAKING

10/23/23 Professional Development.

Outcomes

- Determine the “What” and “How” behind sense making
- Developing a lesson(s) that promotes sense making through collaboration with vertical teams
(Math and ELA utilizing CMAS released items within Areas of Improvement listed below)

Demonstration of Creating Lessons that Feature Sense Making

- Emily Hall – Sense Making in the Classroom Through Political Cartoons
- Carrie Giddings – The “How” and “Why of Our Lessons: Constructing Meaning and Depth of Knowledge Using Mathematical Concepts

Identified Areas of Improvement

- Written Expression (English Language Arts)
- Reasoning/Modeling (Math)

INTEGRATED SEL

SEL Integration work currently taking place at Lincoln Academy

- Work hard, be kind (all)
- SEL Competencies taught through Second Step (all)
- SEL Integration throughout the school day (ILT)

ILT Presentation

- Amy Jenkins – Social Emotional Learning: Empowering Teachers and Staff to Support the Whole Child

SEL Competencies

Self-Awareness

Understanding your emotions and thoughts and how they influence your behavior.

Skills include: identifying emotions, self-perception, recognizing strengths, self-confidence, and self-efficacy.

Self-efficacy is the belief in your ability to succeed in specific situations or accomplishment of a task.

Self-Management

The ability to regulate your emotions and behaviors in different situations and to set and work toward goals.

Skills include: executive function and self-regulation, stress-management, and self-discipline.

Executive function and self-regulation are the mental processes that enable us to plan, focus attention, remember instructions, and juggle multiple tasks successfully. Our brains need this skill set to filter distractions, prioritize tasks, set and achieve goals, and control impulses.

Responsible Decision-Making

The ability to make positive choices and take responsibility for positive and negative outcomes.

Skills include: identifying problems, analyzing situations, solving problems, and reflection.

Social Awareness

The ability to take the perspective of and empathize with others.

Skills include: empathy, appreciating differences, and respect.

Relationship Skills

The ability to establish and maintain healthy and meaningful relationships with others.

Skills include: communicating clearly, listening, cooperation, resisting negative pressure, resolving conflicts, and supporting one another.

MR. TERRY AND MR. MARTIN EATING LUNCH WITH LEOPARDS





Colorado's Unified Improvement Plan for Schools

Lincoln Charter Academy UIP 2023-24 | School: Lincoln Charter Academy | District: Jefferson County R-1 | Org ID: 1420 | School ID: 5145 |
Framework: Performance Plan | Draft UIP

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Last Year UIP: [Lincoln Charter Academy UIP 2022-23](#)

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Improvement Plan Information

Narrative on Data Analysis and Root Cause Identification

Action Plans

Executive Summary



Priority Performance Challenges

- *Mathematical Reasoning and Modeling*

- *Underperforming Students*



Root Cause

- Depth of Knowledge
- Math Resources

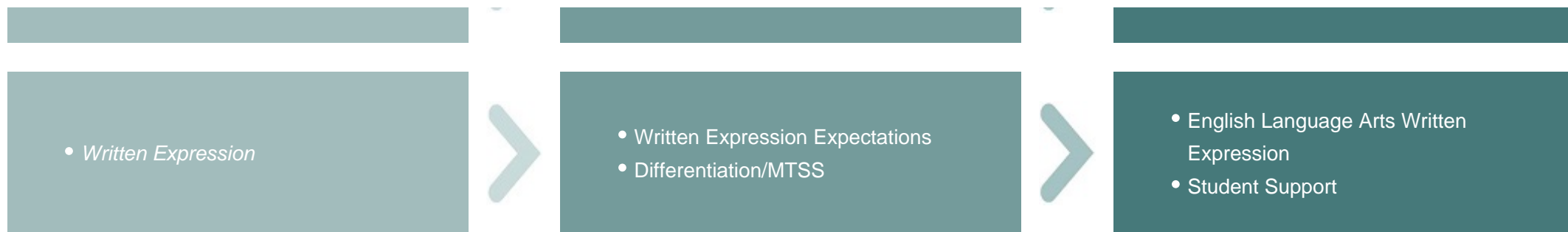
- Depth of Knowledge
- Differentiation/MTSS



Major Improvement Strategies

- Mathematical Reasoning and Modeling

- Student Support



Access the School Performance Framework here: <http://www.cde.state.co.us/schoolview/performance>

Access the Literacy Curriculum Transparency Dashboard here: <https://www.cde.state.co.us/code/literacycurriculumtransparency-dashboard>

Improvement Plan Information

Additional Information about the school

Narrative on Data Analysis and Root Cause Identification

Description of School Setting and Process for Data Analysis

Lincoln Academy is a Core Knowledge charter school located in Arvada, CO. The school opened in 1997 with an enrollment of 119 students. We have since relocated to a larger facility and have grown to a PreK-8 school that continues to provide excellence in education to almost 800 students. We are a school of choice under Jefferson County Public Schools, therefore, all of our Kindergarten through eighth-grade students must open enroll in order to attend. Families generally choose Lincoln Academy because of the focus on the Core Knowledge curriculum and academic rigor. Our free and reduced population was recently reported at 24%. Our non-white students made up 28% of our total student count.

The following information is an analysis of the 2022 CMAS results and internal MAP data. Due to the reduction in required State assessments in the spring of 2021, growth data has some long term holes. However, the school does now have growth data that we can use to measure overall student performance. Lincoln Academy teachers teach the Core Knowledge curriculum and also address the Common Core State Standards. Teachers teach the Core Knowledge curriculum with fidelity which increases student knowledge. This in turn makes students more able to improve their performance on these tests.

We can, however, look at improvement in structure through our curriculum planning, instruction, and pedagogy to improve scores and growth for students. Upon receiving the annual standardized testing data, a team of administration and teachers from each grade level, special education, and specials reviews the data for strengths and growth areas both academically and socially/emotionally.

In previous years, we have worked on differentiation as well as depth of knowledge. These two areas remain important keystones for us. This year we have focused our depth of knowledge work on more rigorous assessments and backward planning. As for differentiation, we have moved more broadly to improve our MTSS (supports for targeted and intensive needs students) process. We have developed teachers in meeting the needs of students in tier 1, 2, and 3 more systematically. Looking over the current data the UIP team has agreed by consensus that our root cause analysis around depth of knowledge (addressed through planning for rigors) and differentiation (more fully addressed through MTSS) is correct, and that to see further progress we can simply focus carefully on these specific aspects.

Prior Year Targets

Provide a summary of your progress in implementing the Major Improvement Strategies and if they had the intended effect on systems, adult actions, and student outcomes (e.g. targets).

While significant progress was made in these areas, we did miss the goal in several areas.

- 1. Overall, we did meet this goal with our average "Did not Meets" percentage going from over 7% down to 5.75%. This is a significant decline and shows that some of the MTSS work has been effective. However, we still had three grade levels who still averaged over 7% in the "Did not Meets" category (3rd ELA, 4th Math, 4th ELA) which shows continued need in that area.
- 2. We had three grade levels meet the Reading expectation (2nd, 3rd, 6th) of being at or above the 60th percentile, but then four grade levels did not. All but one grade level had growth above the 50th percentile. For Math, we did meet the goal and actually hit and average of 61% growth across all grades with only one grade level falling below the 50th percentile in growth (4th).
- 3. While we made progress towards our participation goal (84% to 91%), we did not hit the 95% goal.

Based on your reflection and evaluation, provide a summary of the adjustments that you will make for this year's plan.

We will be updating goal 1 and 2 to include more specific goals and work. These goals will continue in their basic form.
We will be ending goal 3 in favor of a more specific goal tied to academics. While participation continues to be incredibly important, it has improved and we will continue our language work around why CMAS is helpful to our community.

Current Performance

- Highlighted Data is under School Expectations

Current CMAS Performance							

Math Participation Rate	3rd	4th	5th	6th	7th	8th	Average
(percent of students who participated)	97	98	94	94	81	86	91.7
ELA Participation Rate	3rd	4th	5th	6th	7th	8th	Average
(percent of students who participated)	97	98	96	94	81	82	91.3
Math Performance	3rd	4th	5th	6th	7th	8th	Average
(percent of students who met or exceeded the expectation)	47	30	36	38	44	42	39.5
ELA Performance	3rd	4th	5th	6th	7th	8th	Average
(percent of students who met or exceeded the expectation)	36	35	45	68	61	52	49.5
Math Growth Rate (MGP)	3rd	4th	5th	6th	7th	8th	Average
(This number helps us understand the growth of each grade level)	N/A	26	46	65	63	36	47.2
ELA Growth Rate (MGP)	3rd	4th	5th	6th	7th	8th	Average
(This number helps us understand the growth of each grade level)	N/A	34	34	68	38	30	40.8

Historical Context							
Math Performance	3rd	4th	5th	6th	7th	8th	Average
2022-23	47	30	36	38	44	42	39.5
2021-22	57	24	32	41	35	62	41.8

2020-21	NA	37	NA	32	NA	32	33.7
2019-20	NA	NA	NA	NA	NA	NA	NA
2018-19	46	36	31	31	31	31	34.3
2017-18	43	27	33	33	33	24	32.2
ELA Performance	<i>3rd</i>	<i>4th</i>	<i>5th</i>	<i>6th</i>	<i>7th</i>	<i>8th</i>	<i>Average</i>
2022-23	36	35	45	68	61	52	49.5
2021-22	42	36	51	68	59	69	54.2
2020-21	42	NA	58	NA	58	NA	52.7
2019-20	NA	NA	NA	NA	NA	NA	NA
2018-19	41	64	40	40	40	58	47.2
2017-18	51	44	43	43	43	49	45.5

2022-23 Acadience Data				
	<i>K</i>	<i>1st</i>	<i>2nd</i>	<i>3rd</i>
2022 BOY Benchmark	74	58	74	81
2023 EOY Benchmark	85	78	75	90
(percent of students who were at or above the benchmark)				

2021-23 MAP Data								
Math Performance	<i>2nd</i>	<i>3rd</i>	<i>4th</i>	<i>5th</i>	<i>6th</i>	<i>7th</i>	<i>8th</i>	<i>Average</i>
2021 Spring Assessment	65	49	70	46	61	66	47	57.7

2022 Spring Assessment	45	87	56	60	80	76	65	67.0
2023 Spring Assessment	61	90	43	56	67	59	52	61.1
Average Growth (Spring22 to Spring23)	16	3	-13	-4	-13	-17	-13	-5.9
(Median Growth Rate for the Grade level)								
ELA Performance	2nd	3rd	4th	5th	6th	7th	8th	Average
2021 Spring Assessment	47	39	50	42	42	59	52	47.3
2022 Spring Assessment	59	50	51	45	61	62	70	56.9
2023 Spring Assessment	72	75	48	53	60	58	53	59.9
Average Growth (Spring22 to Spring23)	13	25	-3	8	-1	-4	-17	3.0
(Median Growth Rate for the Grade level from Spring to Spring)								

Trend Analysis



Trend Direction: Decreasing

Performance Indicator Target: Academic Achievement (Status)

As measured by the Mathematics CMAS, we are seeing the gap between the highest and lowest achieving students widen and this is especially seen in fourth grade. In 2020-21, 2 percent of fourth grade students exceeded the expectation and 3 percent did not meet the expectation. In 2021-22, only 1 percent of fourth grade students exceeded the expectation and 8 percent did not meet the expectation. In 2022-23, 0 percent of fourth grade students exceeded the expectation and then 10 percent did not meet the expectation.



Trend Direction: Decreasing

Performance Indicator Target: Academic Achievement (Status)

As measured by CMAS, Lincoln Academy continues to underperform when it comes to specifically the ELA test Sub-standard "Written Expression". While on average we scored above the district in this area, there are specific grade levels (4th and 5th) where we significantly underperform. We believe that this is important because the idea of written expression is all throughout the CMAS test and we must be good at that to succeed in other areas.



Trend Direction: Increasing

Performance Indicator Target: Academic Growth

Math Student Growth as measured by the MAP assessment for all students in grades second through eighth has increased over the last four years with a downward trend this last year (2020 = 54, 2021 = 58, 2022 = 67, 2023 = 61). Over the last three years, in all grade-levels besides fourth grade, the Math MAP Growth has demonstrated substantial growth. The increases were between 3 and 38 points.



Trend Direction: Increasing

Performance Indicator Target: Academic Growth

While incomplete from previous years, we have seen measurable growth in our growth scores this last year (5th Math - 38 to 46, 7th Math - 60 to 63, 4th ELA - 26 to 34). This is encouraging because we have not seen growth in these specific grade levels in a little while. We have significant room to grow, but this is very encouraging.



Trend Direction: Decreasing

Performance Indicator Target: Academic Growth

As measured by the annual CMAS assessment, our fourth grade student's academic growth in ELA has been decreasing. This is a notable trend because we have put many different interventions in place to support our students and they do not seem to be positively impacting the scores. The data is somewhat spotty because of the pandemic, but looking at the last several scores (from 64 to 36 to 34), there has been a significant decrease.

Priority Performance Challenges and Root Causes

Priority Performance Challenge: Mathematical Reasoning and Modeling



Lincoln students have underperformed in the areas of Mathematical Reasoning and Modeling on CMAS.

Area of Focus: Math



Root Cause: Depth of Knowledge

There has been a focus on the task and not student thinking and problem-solving as it relates to the task.

Root Cause: Math Resources



We have recently changed our math resources because we saw that the previous resources were not meeting the curricular expectations in certain grade-levels and/or our teachers are not teaching these concepts with the necessary depth of knowledge. While they may excel at supporting both the Major and Supporting Content, we do not see these two sub indicators as clearly supported. We believe that this new resource will accomplish this, but will take time to train our teachers to use it effectively.



Priority Performance Challenge: Underperforming Students

We are seeing the gap between our high achievers and low achievers widening.

Area of Focus: Other achievement



Root Cause: Depth of Knowledge

There has been a focus on the task and not student thinking and problem-solving as it relates to the task.

Root Cause: Differentiation/MTSS



As a school, we want to continue to ensure that our Tier 1 instruction is of the highest quality and is provided to all students before a student is put into a Tier 2/3 intervention. We also want to ensure that teachers know where our students are academically so that they can then put the best and most impactful interventions in place. We believe that this is an ongoing instructional challenge.



Priority Performance Challenge: Written Expression

Lincoln students have underperformed in the areas of Written Expression on CMAS.

Area of Focus: English/Language Arts

Root Cause: Written Expression Expectations



We feel that we have the right curriculum to support our students, but we believe that we are not teaching directly to and then holding students to the same expectation that is set for Written Expression on CMAS. We must become more clear and consistent with our expectations around written expression.

Root Cause Category: Instruction



Root Cause: Differentiation/MTSS

As a school, we want to continue to ensure that our Tier 1 instruction is of the highest quality and is provided to all students before a student is put into a Tier 2/3 intervention. We also want to ensure that teachers know where our students are academically so that they can then put the best and most impactful interventions in place. We believe that this is an ongoing instructional challenge.

Magnitude of Performance Challenges and Rationale for Selection:



We recognize that our growth in MAP has been significant and yet our achievement as assessed by CMAS has been stable. As we look through the sub-indicators identified in CMAS, we are lagging behind the state and the district in both Mathematical Reasoning and Mathematical Modeling. If we hope to have the same growth in CMAS as we see in MAP, our students must perform in these two areas.

Along these same lines, our students have been struggling with Written Expression on the ELA CMAS test. This is significant because written expression runs through all parts of the test but is also a key indicator if students are actually understanding and applying their learning. Our students must perform in this area.

The data in multiple points (see trends) is showing us that the difference between our highest achieving student and our lowest achieving students is becoming more and more wide. This is evident in both the Exceeds Expectations and the Did not Meet Expectations categories growing. While it is important that we push our gifted students towards new academic heights, we are seeking to meet the needs of all learners and help all students meet their highest academic potential.

Magnitude of Root Causes and Rationale for Selection:



As the staff and UIP team reviewed data, we found that when students have been unsuccessful in meeting targets on state assessments this was often associated with a mismatch between classroom expectations and the state standardized tests. This was particularly noticed as it related to problem solving, multi-step problems, constructed and extended response questions. This similarly applies to our work in Written Expression on the CMAS ELA test. When our students do not score as highly as they could or should on this portion, they are showing that they do not have the framework to be able to respond well to the expectation. Our internal school data which probes less deeply (questions are largely multiple choice, reading selections are shorter, and limited writing is involved) shows a contrasting picture, illuminating the need for continued focus on depth of knowledge strategies. Lincoln is continuing to

recognize that differentiation is an ongoing need for our students and while we have seen a marked improvement in certain subgroups, there are other subgroups that we are going to be emphasizing. Implementing a systematic school-wide approach to the MTSS process for students will ensure students' academic needs are being met with fidelity. We also must be more clear and consistent with our language around the importance of CMAS. Recognizing that there are many different viewpoints around CMAS, we still must communicate the value of the assessment in better supporting our students.

Action Plans

Planning Form



Student Support

What will success look like: Using various points of student data, teachers will work collaboratively to adjust Tier 1 instruction based on student needs. From that foundation, teachers will then collaborate with their team and our DSS staff to develop Tier 2 and 3 interventions that connect back to Tier 1 instruction but meet individual student needs. Lesson planning and the implementation of instruction will take into account the range of academic and affective needs of their students.


Associated Root Causes:



Differentiation/MTSS:

As a school, we want to continue to ensure that our Tier 1 instruction is of the highest quality and is provided to all students before a student is put into a Tier 2/3 intervention. We also want to ensure that teachers know where our students are academically so that they can then put the best and most impactful interventions in place. We believe that this is an ongoing instructional challenge.

Implementation Benchmarks Associated with MIS

IB Name	Description	Start/End/ Repeats	Key Personnel	Status
 Winter MAP Assessment	Teachers will use the Winter MAP Assessment scores to determine the effectiveness of Tier 1 instructional improvements	12/04/2023 01/26/2024	Teachers, Coaches, Admin, DSS, Instructional Leadership Team	

Action Steps Associated with MIS

Name	Description	Start/End Date	Resource	Key Personnel	Status
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Instructional Strategies/Planning

Professional Learning/Coaching with all staff specifically to improve Tier 1 instruction in all areas of the school

08/14/2023
05/24/2024

Best practices,
Education articles,
Teacher Rubrics,
Feedback Forms

Teachers,
Coaches, Admin,
DSS Team,
Instructional
Leadership Team



Learning Walks

Classroom Observations by a group of Admin/Coaches and then feedback given to the staff member to improve instruction.

09/04/2023
05/24/2024

Rubrics developed
by Admin to
determine
Effectiveness.

Teachers,
Coaches, Admin,
DSS Team



MTSS Meetings

We will be utilizing monthly MTSS meetings to support the teacher with Tier 1 and 2 strategies for specific students

09/26/2023
05/24/2024

MTSS forms,
Student Data

Teachers, Admin,
DSS Team



English Language Arts Written Expression

What will success look like: Teachers will look in the resources for prompts best aligned with supporting grade-level standards around written expression. They will also look at the CMAS Evidence Statement Alignment documents that provide teachers with data showing the types of problems that our students struggled the most with as they relate to written expression. Teachers will make sure that they either use or tweak prompts related to these areas that are covered in their resources or similar prompts in other resources to best address these areas. They will also utilize Best Instructional Practices in ways that support students with engaging in and making sense of writing prompts.

Describe the research/evidence base supporting the strategy and why it is a good fit: These strategies will provide our students with prompts and instruction that will support depth of knowledge in ELA at a level that will match the CMAS expectations.

Strategy Category:


Associated Root Causes:

Written Expression Expectations:




We feel that we have the right curriculum to support our students, but we believe that we are not teaching directly to and then holding students to the same expectation that is set for Written Expression on CMAS. We must become more clear and consistent with our expectations around written expression.

Implementation Benchmarks Associated with MIS

IB Name	Description	Start/End/ Repeats	Key Personnel	Status
 MAP Winter Data	Teachers will use the Winter MAP Assessment scores to determine the effectiveness of Tier 1 instructional improvements	12/04/2023 01/26/2024 Quarterly	Teachers	

Action Steps Associated with MIS

Name	Description	Start/End Date	Resource	Key Personnel	Status
 Instructional Strategies/Coaching	Professional Learning/Coaching with all staff specifically to improve Tier 1 instruction in all areas of the school	08/14/2023 05/17/2024	Best practices, Education articles, Teacher Rubrics, Feedback Forms	Teachers, Coaches, Administration, DSS, Instructional Leadership Team	
 Learning Walks	Classroom Observations by a group of Admin/Coaches and then feedback given to the staff member to improve instruction.	08/14/2023 05/19/2024	Rubrics developed by Admin to determine Effectiveness.	Teachers, Coaches, Administration, DSS	



Mathematical Reasoning and Modeling

What will success look like: Teachers will look in the resources for problems best aligned with providing students with opportunities to reason and model. They will also look at the CMAS Evidence Statement Alignment documents that provide teachers with data showing the types of problems that our students struggled the most with as they relate to reasoning and modeling. Teachers will make sure that they either use or tweak problems related to these areas that are covered in their resources or similar problems in other resources to best address these areas. They will also utilize Best Instructional Practices in ways that support students with engaging in and making sense of problems involving reasoning and modeling.

Describe the research/evidence base supporting the strategy and why it is a good fit: These strategies will provide our students with problems and the instruction will support depth of knowledge in math at a level that will match the CMAS expectations.

Strategy Category:


Associated Root Causes:

Math Resources:




We have recently changed our math resources because we saw that the previous resources were not meeting the curricular expectations in certain grade-levels and/or our teachers are not teaching these concepts with the necessary depth of knowledge. While they may excel at supporting both the Major and Supporting Content, we do not see these two sub indicators as clearly supported. We believe that this new resource will accomplish this, but will take time to train our teachers to use it effectively.

Implementation Benchmarks Associated with MIS

IB Name	Description	Start/End/ Repeats	Key Personnel	Status
 Winter MAP Assessment	Teachers will use the Winter MAP assessment data to determine the effectiveness of the changes in the classroom and then use that to direct modifications to Tier 1 and 2 instruction.	12/12/2023 02/06/2024	Teachers, Coaches, Admin, DSS, Instructional Leadership Team	

Action Steps Associated with MIS

Name	Description	Start/End Date	Resource	Key Personnel	Status
 Team Planning	Teachers will look at MAP, CMAS, and Classroom data to determine student need around Mathematical Reasoning and Modeling and then adjust Tier 1 instruction and homework to best meet student needs.	09/06/2023 05/19/2024	Curriculum, Best Practices	Teachers, Coaches, Admin, DSS	

School Target Setting





Priority Performance Challenge : Mathematical Reasoning and Modeling



PERFORMANCE INDICATOR: Academic Growth

MEASURES / METRICS: M

ANNUAL PERFORMANCE TARGETS

2023-2024: We expect that the median growth percentile of our students will exceed the 55th percentile on the CMAS Math assessment.

2024-2025: We expect that the median growth percentile of our students will exceed the 60th percentile on the CMAS Math assessment.

INTERIM MEASURES FOR 2023-2024:



Priority Performance Challenge : Underperforming Students



PERFORMANCE INDICATOR: Academic Achievement (Status)

MEASURES / METRICS:

ANNUAL PERFORMANCE TARGETS

2023-2024: In both the Math and ELA assessments, less than 5% of our students should be in the category "Does not meet Expectations".

2024-2025: In both the Math and ELA assessments, less than 3% of our students should be in the category "Does not meet Expectations".

INTERIM MEASURES FOR 2023-2024:



Priority Performance Challenge : Written Expression



PERFORMANCE INDICATOR: Academic Achievement (Status)

MEASURES / METRICS: ELA

ANNUAL PERFORMANCE TARGETS

2023-2024: We expect that the median growth percentile of our students will exceed the 50th percentile on the CMAS ELA assessment.

2024-2025: We expect that the median growth percentile of our students will exceed the 55th percentile on the CMAS ELA assessment.

INTERIM MEASURES FOR 2023-2024:

2023-2024 Executive Team Report

Amanda Corrion, Board President

November 2023

1. Agenda Meeting

Mr. Schoenhals, Micah and Amanda met at the beginning of October to review the agenda, issues that have arisen and staff professional development. Mr. Schoenhals reviewed his plan for his report.

2. Recruitment

We will continue to recruit through different avenues of the school. Two of the Board members will be completing their terms in the spring so ongoing recruitment is needed.

3. Committee Support

Amanda is planning on attending each committee meeting at least once this school year. Please invite Amanda to all committee meetings and she will attend where able.

4. Volunteer Hours

Thank you to everyone who has volunteered and please keep logging them. One of the specifics for our charter is family involvement. One way to show this for our renewal is through volunteer hour collection. Plus, it's always fun to share how much we are contributing to Lincoln. Anyone can find the log, what counts as volunteer time and more information under the Volunteer page on the website.

Finance Committee Report

The finance committee is responsible for planning, monitoring, and recommending the yearly budget to the Board of Directors. As needed, this committee will make recommendations to the Board of Directors in relation to Operational and Fiscal Planning.

Executive Summary

- Onboarding New Council Member
- 2023-2024 Financials
- 2023-2024 Working Budget

Onboarding New Council Member

- One new member has been added
- Still looking for 1-2 members to join

November 2023-24 Financial Review:

- Received the majority of the anticipated ESSER 3 reimbursements
- Close to 85% of student fees and dues have been received
- Expenses for the house demolitions are in the expenses and will be updated on the next iteration of the budget
- Expenses and revenues are being realized within expected parameters
- Higher than expected donation from the PTO (Sound Booth Updates)
- Revenue on investments is favorable to predictions
- Savings realized for Chromebooks will be reallocated to other classroom equipment

November 2023-24 Budget Review:


- Expected student count is 772, but we have not received the official figure
- Working to update the budget with the expected student count the current modifications
 - Planning to submit an updated budget in December
- Improvements on revenue from the Pre-Kindergarten and Leopard programs
- Tracking possible unfavourability regarding risk coverage
- Realizing shifted expenses from 2022-23 for REVEAL Math
- Realizing shifted expenses from 2022-23 for the 72nd project
- Project Margin is near 5%

Proposed Motions

- None

Contact Travis Harrison if you would like to join this committee: TravisHarrison@lincolnacademy.net

Jefferson County Public Schools
Charter Schools
Lincoln Academy Charter School
Report ID: 558OPC
For Accounting Period:
10/31/23




Lincoln Academy Charter School
Unaudited Financials
07/01/2023 - 10/31/2023

November 14, 2023

Account		Prior Year	Prior Year			Current Year	Current Year	Current Year		
Number	Description	Capital Funds	Total	Estimated Revenue	Budget	Operational Funds	Capital Funds	Total	Variance	Percent Spent
Prior Year Carryforward			5,835,465.50			3,675,067.01	2,412,894.91	6,087,961.92		
401000	Commissions/Profits	-	1,847.43	8,663.00	0.00	-	-	-	8,663.00	0%
401400	Ticket Sales	-	1,005.00	1,668.00	0.00	-	-	-	1,668.00	0%
408000	Resale	-	21,785.36	20,000.00	0.00	16,158.12	-	16,158.12	3,841.88	81%
409000	Sales-Fund Raising	-	4,424.41	12,846.00	0.00	2,760.15	-	2,760.15	10,085.85	21%
411000	Prop Tax-Mill Levy Override	-	1,463,617.50	1,471,266.00	0.00	775,284.54	-	775,284.54	695,981.46	53%
415000	Earnings On Investments	83,747.79	83,747.79	11,330.00	0.00	-	29,981.90	29,981.90	(18,651.90)	265%
419000	Other Revenue	-	9.14	1,137.00	0.00	-	-	-	1,137.00	0%
433000	State Revenue - Capital Construction	257,864.60	257,864.60	276,696.00	0.00	56,843.33	-	56,843.33	219,852.67	21%
433000	State Revenue - UPK Payments	-	-	-	0.00	-	49,852.64	49,852.64	(49,852.64)	n/a
434000	Exceptional Children Revenue	-	99,636.00	89,250.00	0.00	90,354.00	-	90,354.00	(1,104.00)	101%
450000	Transfers PPR	412,248.75	6,974,913.52	7,558,488.00	0.00	3,903,624.90	-	3,903,624.90	3,654,863.10	52%
450000	Transfers Bond	-	412,248.75	461,120.50	0.00	-	97,314.96	97,314.96	363,805.54	21%
451000	Fees/Dues	-	96,179.75	82,817.00	0.00	70,176.73	-	70,176.73	12,640.27	85%
455000	Tuition from Individuals	-	275,019.12	253,895.00	0.00	46,010.98	-	46,010.98	207,884.02	18%
461000	Building Rental	-	6,490.00	15,796.00	0.00	-	-	-	15,796.00	0%
474000	Transportation - Field Trips	-	35,963.85	49,968.00	0.00	32,087.55	-	32,087.55	17,880.45	64%
482000	Activity Revenue	-	11,912.50	21,711.00	0.00	6,240.00	-	6,240.00	15,471.00	29%
498000	Donations	-	35,734.00	5,000.00	0.00	18,169.49	-	18,169.49	(13,169.49)	363%
499000	Miscellaneous Revenue	-	-	600.00	0.00	-	-	-	600.00	0%
950500	Mandatory Transfers State Intercept	(372,995.32)	(412,248.75)	(461,120.50)	0.00	(6,805.71)	(90,509.25)	(97,314.96)	(363,805.54)	21%
Revenues		380,865.82	9,370,149.97	9,881,131.00	-	5,010,904.08	86,640.25	5,097,544.33	4,783,586.67	52%
Available		380,865.82	15,205,615.47	9,881,131.00		8,685,971.09	2,499,535.16	11,185,506.25	4,783,586.67	113%
511700	Executive Director	-	-		0.00	-	-	-	-	n/a
512100	Principal	-	-		0.00	-	-	-	-	n/a
513100	Assistant Principal	-	-		0.00	-	-	-	-	n/a
521000	Dean	-	-		0.00	-	-	-	-	n/a
511700 - 521000	Administration	-	338,245.10		377,010.00	123,073.64	-	123,073.64	253,936.36	33%
521100	Teacher	-	2,830,544.48		3,171,284.00	1,043,136.19	-	1,043,136.19	2,128,147.81	33%
521900	Substitute Teacher	-	30,930.00		45,000.00	4,400.00	-	4,400.00	40,600.00	10%
522100	Counselor	-	25,904.62		69,517.00	10,404.16	-	10,404.16	59,112.84	15%
522200	Teacher Librarian	-	75,522.00		85,417.00	27,647.78	-	27,647.78	57,769.22	32%
524200	Coordinator - Classified	-	151,293.03		162,970.00	57,755.89	-	57,755.89	105,214.11	35%
526200	Instructional Coach	-	130,552.14		153,729.00	49,243.42	-	49,243.42	104,485.58	32%
529200	Occupational Therapist	-	30,108.57		27,540.00	7,795.56	-	7,795.56	19,744.44	28%
529400	Nurse	-	25,500.00		44,394.00	9,010.00	-	9,010.00	35,384.00	20%
529600	Social Worker	-	71,165.10		133,405.00	8,811.92	-	8,811.92	124,593.08	7%
529800	Speech Therapist	-	47,910.15		53,363.00	12,733.20	-	12,733.20	40,629.80	24%
552100	School Secretary	-	226,216.17		255,664.00	77,138.62	-	77,138.62	178,525.38	30%
557100	Paraprofessional	-	688,993.24		770,693.00	184,500.10	-	184,500.10	586,192.90	24%
557600	Clinic Aides	-	27,856.62		29,700.00	9,840.04	-	9,840.04	19,859.96	33%
591100	Custodian	-	118,162.18		153,889.00	33,699.68	-	33,699.68	120,189.32	22%
591400	Campus Supervisor	-	67,619.39		69,055.00	26,637.24	-	26,637.24	42,417.76	39%
599400	Unused Sick Leave	-	26,954.21		25,000.00	-	-	-	25,000.00	0%
599810	Additional Pay - Certificated	-	2,695.00		15,000.00	-	-	-	15,000.00	0%
599820	Additional Pay-Classified	-	2,521.15		1,750.00	650.00	-	650.00	1,100.00	37%
599830	Additional Pay-Administrative	-	200.00		1,750.00	-	-	-	1,750.00	0%
Salaries		-	4,918,893.15		5,646,130.00	1,686,477.44	-	1,686,477.44	3,959,652.56	30%
699000	Employee Benefits	-	1,420,501.56		1,697,476.75	485,230.92	-	485,230.92	1,212,245.83	29%
Benefits		-	1,420,501.56		1,697,476.75	485,230.92	-	485,230.92	1,212,245.83	29%
Total Salaries and Benefits		-	6,339,394.71		7,343,606.75	2,171,708.36	-	2,171,708.36	5,171,898.39	30%
701000	Mileage And Travel	-	53.94		1,100.00	55.02	-	55.02	1,044.98	5%
702000	Employee Training & Conf	-	3,557.46		18,350.00	-	-	-	18,350.00	0%
703000	Awards And Banquets	-	-		0.00	-	-	-	-	n/a
708000	Background Verifications	-	2,254.70		2,500.00	1,034.80	-	1,034.80	1,465.20	41%
710000	Meals/Refreshments	-	4,554.67		7,805.00	1,153.53	-	1,153.53	6,651.47	15%
713000	Student Transportation	-	6,672.85		10,498.00	-	-	-	10,498.00	0%
715000	Student Admission/Entry Fees	-	34,885.81		43,000.00	26,680.00	-	26,680.00	16,320.00	62%
721000	Legal Fees	-	637.50		10,000.00	532.50	-	532.50	9,467.50	5%
723000	Printing	-	-		1,100.00	-	-	-	1,100.00	0%
731000	Contracted Services	-	170,452.83		190,000.00	52,189.34	-	52,189.34	137,810.66	27%
735000	Bank Fees & Other Expense	4,586.25	4,586.25		0.00	-	1,481.81	1,481.81	(1,481.81)	n/a
743000	Equipment Rental	-	1,146.22		5,500.00	404.99	-	404.99	5,095.01	7%
745000	Contract Maint/Eq Repair	-	10,568.65		10,100.00	104.10	-	104.10	9,995.90	1%
745500	Technology Services	-	51,403.06		85,000.00	24,874.01	-	24,874.01	60,125.99	29%
746000	Const Maint/Repair-Bldg	-	136,338.81		75,000.00	111,694.64	-	111,694.64	(36,694.64)	149%
747000	Software Purch/Lease	-	-		0.00	-	-	-	-	n/a



Account		Prior Year	Prior Year			Current Year	Current Year	Current Year		
Number	Description	Capital Funds	Total	Estimated Revenue	Budget	Operational Funds	Capital Funds	Total	Variance	Percent Spent
752000	Marketing - Advertising	-	8,442.60		3,000.00	1,006.69	-	1,006.69	1,993.31	34%
761000	Natural Gas	-	29,924.17		45,000.00	2,744.63	-	2,744.63	42,255.37	6%
764000	Electricity	-	77,643.49		85,000.00	25,207.42	-	25,207.42	59,792.58	30%
765000	Voice Communication Line	-	12,846.37		20,000.00	4,795.94	-	4,795.94	15,204.06	24%
766000	Water & Sanitation	-	18,310.51		22,000.00	4,810.65	-	4,810.65	17,189.35	22%
768000	Postage	-	249.40		600.00	324.37	-	324.37	275.63	54%
769000	Permits/Licenses/Fees	-	26,714.76		22,000.00	5,118.11	-	5,118.11	16,881.89	23%
770000	Risk Management Charges	-	81,221.93		90,000.00	45,028.50	-	45,028.50	44,971.50	50%
770800	Unemployment Comp Insur	-	9,782.47		16,938.00	457.32	-	457.32	16,480.68	3%
781000	Lease Purch-Other-Principal	140,000.00	140,000.00		145,000.00	-	-	-	145,000.00	0%
781500	Lease Purch-Other-Interest	319,024.10	319,024.10		315,631.00	-	157,815.35	157,815.35	157,815.65	50%
950000	Transfers District Fees	-	852,395.67		888,324.00	451,031.28	-	451,031.28	437,292.72	51%
	Purchased Services	463,610.35	2,003,668.22		2,113,446.00	759,247.84	159,297.16	918,545.00	1,194,901.00	43%
801000	Contingency	-	-		0.00	-	-	-	-	n/a
804000	Fund Raising	-	-		1,500.00	-	-	-	1,500.00	0%
805000	Materials/Supplies-Other	-	12,292.36		23,000.00	5,554.00	-	5,554.00	17,446.00	24%
806000	Materials/Supplies Resale	-	18,866.21		23,000.00	2,048.80	-	2,048.80	20,951.20	9%
807000	Furniture & Fixtures	-	-		0.00	-	-	-	-	n/a
810000	Office Material/Supplies	-	1,808.25		3,500.00	2,555.92	-	2,555.92	944.08	73%
810001	Office Equipment - Under \$5K	-	41,800.75		30,000.00	2,186.86	-	2,186.86	27,813.14	7%
812000	Clinic Supplies/Materials	-	723.77		1,250.00	288.42	-	288.42	961.58	23%
814000	Custodial Supplies	-	15,714.82		17,200.00	3,044.43	-	3,044.43	14,155.57	18%
820000	Instructional Material/Supply	-	70,857.04		108,035.00	15,222.52	-	15,222.52	92,812.48	14%
820001	Instructional Equip-Under \$5K	-	22,550.04		50,000.00	56,343.10	-	56,343.10	(6,343.10)	113%
822000	Textbooks	-	101,133.20		30,000.00	13,135.92	-	13,135.92	16,864.08	44%
823000	Copier Usage	-	30,748.68		35,000.00	5,498.79	-	5,498.79	29,501.21	16%
824000	Testing Materials	-	618.36		2,000.00	-	-	-	2,000.00	0%
826000	Graduation Materials	-	33.13		500.00	-	-	-	500.00	0%
829000	Athletic Supplies	-	-		0.00	-	-	-	-	n/a
840000	Maint Materials/Supplies	-	24,997.64		30,000.00	7,475.30	-	7,475.30	22,524.70	25%
852000	Vehicle Fuel Expense	-	-		0.00	-	-	-	-	n/a
870000	Library Materials	-	4,621.94		3,200.00	1,331.20	-	1,331.20	1,868.80	42%
885000	Miscellaneous Expense	-	-		500.00	-	-	-	500.00	0%
889000	Consumable Supplies	-	12.47		500.00	-	-	-	500.00	0%
	Materials and Supplies	-	346,778.66		359,185.00	114,685.26	-	114,685.26	244,499.74	32%
930000	Building Improvements	-	427,811.96		2,365,000.00	1,980,217.47	-	1,980,217.47	384,782.53	84%
	Capital Outlay	-	427,811.96		2,365,000.00	1,980,217.47	-	1,980,217.47	384,782.53	84%
	Total Expenditures	463,610.35	9,117,653.55		12,181,237.75	5,025,858.93	159,297.16	5,185,156.09		
	Pre-Adjusted Carryforward	(82,744.53)	6,087,961.92			3,660,112.16	2,340,238.00	6,000,350.16		
810001	Office Equipment - Under \$5K	-	-		0.00	-	-	-		
	Encumbrances	-	-		-	-	-	-		
810001	Office Equipment - Under \$5K	-	-		0.00	-	-	-		
	Requisitions	-	-		-	-	-	-		
TABOR (school enters amount)					(251,750.87)					
	Adjusted Carryforward	(82,744.53)	6,087,961.92			3,660,112.16	2,340,238.00	6,000,350.16		

Jefferson County Public Schools Charter Schools Lincoln Academy Charter School									
Budget for 23-24									
Account		23-24 WORKING BUDGET BOARD APPROVED			23-24 WORKING BUDGET BOARD REVIEW NOVEMBER 2023			COMMENTS ON CHANGES SINCE APRIL	
Number	Description	Estimated Revenue	Budget	Bond Transfers	Estimated Revenue	Budget	Bond Transfers		
	Prior Year Carry forward								
401000	Commissions/Profits	8,663.00	0.00		8,663.00	0.00			
401400	Ticket Sales	1,668.00	0.00		1,668.00	0.00			
408000	Resale	20,000.00	0.00		20,000.00	0.00			
409000	Sales-Fund Raising	12,846.00	0.00		12,846.00	0.00			
411000	Prop Tax-Mill Levy Override	1,471,266.00	0.00		1,500,066.00	0.00		REVISED STUDENT COUNT SEE FUNDING SHEET	
415000	Earnings On Investments	11,330.00	0.00		65,000.00	0.00		CURRENT PROJECTION ON INTEREST EARNING FROM OUR BOND ACCOUNTS. CURRENTLY RECEIVING \$10,000 MONTHLY BUT \$7000 IF FROM THE PROJECT FUND THAT ACCOUNT BALANCE WILL DROP AS WE SUBMIT REIMBURSEMENT THROUGHOUT THE YEAR.	
419000	Other Revenue	1,137.00	0.00		1,137.00	0.00			
433000	State Revenue - Other Cap Construction	276,696.00	0.00		273,036.00	0.00		REVISED STUDENT COUNT SEE FUNDING SHEET	
433000	State Revenue - Other UPK Payments	-	0.00		188,500.00			UPK PAYMENT WILL POST TO THIS LINE NOT 455000	
434000	Exceptional Children Revenue	89,250.00	0.00		90,354.00	0.00		WE HAVE RECEIVED OUR ACTUAL FUNDING	
450000	Transfers PPR Funding ONLY	7,558,488.00	0.00		7,972,482.60	0.00		REVISED FUNDING AND STUDENT COUNT SEE FUNDING SHEET	
451000	Fees/Dues	82,817.00	0.00		82,817.00	0.00			
455000	Tuition from Individuals	253,895.00	0.00		111,500.00	0.00		REVISED 455000 BUDGET PART OF THIS MONEY WILL NOW POST TO 433000 UPK PAYMENTS	
461000	Building Rental	15,796.00	0.00		15,796.00	0.00			
474000	Trans - Field Trips	49,968.00	0.00		49,968.00	0.00			
482000	Resale/Activity Revenue	21,711.00	0.00		21,711.00	0.00			
498000	Donations	5,000.00	0.00		18,169.49	0.00		DONATION RECEIVED FROM PTO TO PAY FOR THE SOUND BOOTH UPGRADES ADDED TO THE CAPITAL OUTLAY	
499000	Miscellaneous Revenue	600.00	0.00		600.00	0.00			
950500	State Intercept Bond Transfers	(461,120.50)	0.00	461,120.50	(461,120.50)	0.00	461,120.50		
	Revenues	9,420,010.50	0.00	461,120.50	9,973,193.59	0.00	461,120.50		
512100-513100	Administration		377,010.44			377,010.44			
521100	Teacher		3,171,284.36			3,171,284.36			
521900	Substitute Teacher		45,000.00			45,000.00			
522100	Counselor		69,516.84			69,516.84			
522200	Teacher Librarian		85,417.20			85,417.20			
524200	Coordinator - Classified		162,970.49			162,970.49			
526200	Instructional Coach		153,729.02			153,729.02			
529200	Occupational Therapist		27,540.00			44,393.64		ERROR AMOUNTS WERE REVERSED NO CHANGE TO THE BOTTOM LINE	
529400	Charter Nurse		44,393.64			27,540.00			
529600	Social Worker		133,405.12			133,405.12			
529800	Speech Therapist		53,362.80			53,362.80			
552100	School Secretary		255,663.84			255,663.84			
557100	Paraprofessional		770,693.94			770,693.94			
557600	Clinic Aides		29,700.48			29,700.48			
591100	Custodian		153,888.76			153,888.76			
591400	Campus Supervisor		69,055.20			69,055.20			
599400	Unused Sick Leave		25,000.00			25,000.00			
599810	Additional Pay - Certificated		15,000.00			15,000.00			
599820	Additional Pay-Classified		1,750.00			1,750.00			
599830	Additional Pay-Administrative		1,750.00			1,750.00			
	Salaries		5,646,132.13	-		5,646,132.13	-		
699000	Employee Benefits		1,697,476.75	-		1,697,476.75	-		
	Benefits		1,697,476.75	-		1,697,476.75	-		
	Total Salaries and Benefits		7,343,608.87			7,343,608.87			

701000	Mileage And Travel		1,100.00			1,100.00			
702000	Employee Training & Conf		18,350.00			18,350.00			
708000	Employee Background Verificatn		2,500.00			2,500.00			
710000	Meals/Refreshments		7,805.00			7,805.00			
713000	Student Transportation		10,500.00			10,500.00			
715000	Student Admission/Entry Fees		43,000.00			43,000.00			
721000	Legal Fees		10,000.00			10,000.00			
723000	Printing		1,100.00			1,100.00			
731000	Contracted Services		190,000.00			190,000.00			
735000	Bank Fees		0.00			5,200.00		BANK FEES RELATED TO THE BOND ADDED TO THE BUDGET IN 22-23 BUT NOT ROLLED INTO THE APRIL BUDGET	
743000	Equipment Rental		5,500.00			5,500.00			
745000	Contract Maint/Eq Repair		10,100.00			10,100.00			
745500	Technology Services		85,000.00			85,000.00			
746000	Const Maint/Repair-Bldg		75,000.00			201,500.00		COST OF THE HOUSE DEMO APPROVED IN 22-23 ROLLED INTO 23-24 \$126500	
752000	Marketing - Advertising		3,000.00			3,000.00			
761000	Natural Gas		45,000.00			45,000.00			
764000	Electricity		85,000.00			85,000.00			
765000	Voice Communication Line		20,000.00			20,000.00			
766000	Water & Sanitation		22,000.00			22,000.00			
768000	Postage		600.00			600.00			
769000	Permits/Licenses/Fees		22,000.00			22,000.00			
770000	Risk Management Charges		90,000.00			90,000.00		WATCHING RISK CAREFULLY MAY NEED AN INCREASE BASED ON THE DEDUCTABLE CHARGES FOR 23-24	
770800	Unemployment Comp Insur		16,938.40			16,938.40			
781000	Lease Purch-Other-Principal		0.00	145,000.00		0.00	145,000.00		
781500	Lease Purch-Other-Interest		0.00	315,630.70		0.00	315,630.70		
950000	Transfers District Fees		888,324.40			921,124.13		DISTRICT FEES BASED ON THE NEW PPR NUMBER	
	Purchased Services		1,652,817.80	460,630.70		1,817,317.53	460,630.70		
804000	Fund Raising		1,500.00			1,500.00			
805000	Materials/Supplies-Other		23,000.00			23,000.00			
806000	Materials/Supplies Resale		23,000.00			20,500.00		MOVE \$2500 TO LIBRARY 870000 WE KEPT BOOKFAIR PROFITS TO ORDER OUTSIDE OF SCHOLSTICT	
810000	Office Material/Supplies		3,500.00			3,500.00			
810001	Office Equipment - Under \$5K		30,000.00			11,000.00		LOWERED THIS LINE THE LAPTOP ORDER FOR 23-24 WAS PAID IN 22-23 DUE TO THE VENDOR INVOICING \$10,500 PRICING FOR LAPTOP CAME IN WELL BELOW OUR ORIGINAL PROJECTION USE THIS SAVINGS TO ORDER ADDITION PROMETHIAN BOARDS FOR CLASSROOMS MOVED \$8,500 TO 820001	
812000	Clinic Supplies/Materials		1,250.00			1,250.00			
814000	Custodial Supplies		17,200.00			17,200.00			
820000	Instructional Material/Supply		108,035.00			108,035.00			
820001	Instructional Equip-Under \$5K		50,000.00			58,500.00		ROLL THE SAVINGS ON LAPTOP TO THIS LINE TO PURCHASE PROMETHIAN BOARDS INSTEAD OF PROJECTORS	
822000	Textbooks		30,000.00			43,500.00		A PORTION OF THE REVEAL MATH ORDER APPROVED ON 22-23 ROLLED INTO 23-24 \$13,500	
823000	Copier Usage		35,000.00			35,000.00			
824000	Testing Materials		2,000.00			2,000.00			
826000	Graduation Materials		500.00			500.00			
840000	Maint Materials/Supplies		30,000.00			30,000.00			
870000	Library Materials		3,200.00			5,700.00		ADDED \$2500 TO THIS LINE WAS TAKEN FROM 806000	
885000	Miscellaneous Expense		500.00			500.00			
889000	Consumable Supplies		500.00			500.00			
	Materials and Supplies		359,185.00	-		362,185.00	-		
930000	Building Improvements		50,000.00	0.00		50,000.00	0.00		
930000	Building Improvements					18,053.01		SOUND BOOTH UPGRADES PAID BY PTO SEE DONATIONS	
	Capital Outlay		50,000.00	-		625,000.00	1,700,339.33	THE 72ND AVENUE PROJECT	
						693,053.01	1,700,339.33		
		801000 Contingency Appropriation for Building Needs	0.00		801000 Contingency Appropriation for Building Needs	0.00			
	Total Expenditures		9,405,611.67	460,630.70		10,216,164.41	2,160,970.03		

[illegible]