

# BOARD UPDATE



## Charter Goals:

- 1 Board Members will review and discuss internal and external student data, presented by the director, to assess goal achievement and academic progress.
- 2 % of students demonstrating proficiency on each state mandated end-of-year assessment, as compared to the average of WCSD and UT.
- 3 % of students demonstrating growth in each state mandated end-of-year assessment subject



## 2025-2026 Goals

**Academics** - By the end of the 2025-2026 school year, 85% of students will show growth in math fluency from beginning of year to end of year!

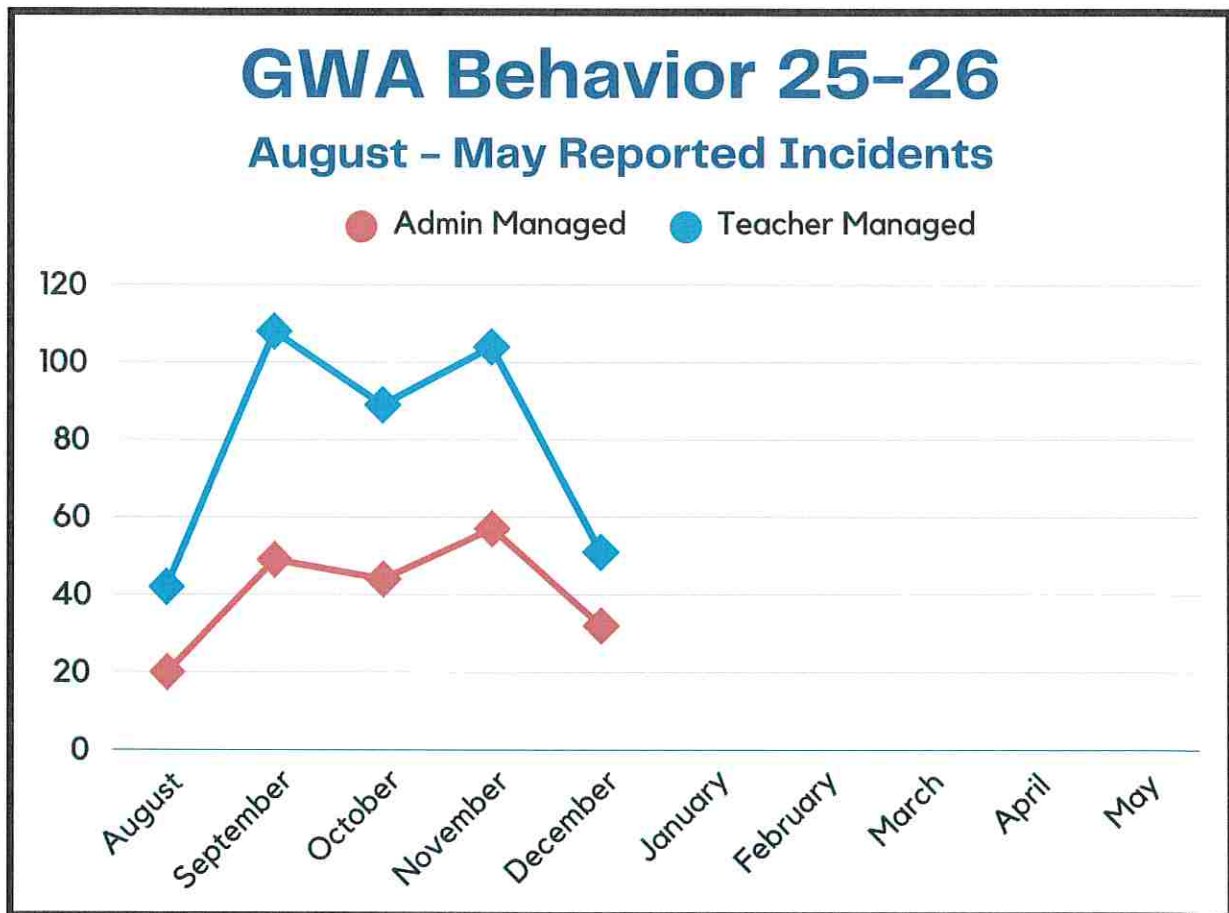
**Leadership** - Teachers will lead their own professional development by sharing and modeling best practices in academic instruction and behavior support, fostering a culture of shared leadership and continuous growth.

**Community** - Foster a positive school culture that motivates by embedding regular meaningful celebrations that recognize student achievement, personal growth, and staff contributions.

OVERTIME: 0 HOURS

ATTENDANCE: 89%  
TARDY: 99%

# BEHAVIOR DATA





# BEHAVIOR DATA

**Q1**

**Q2**

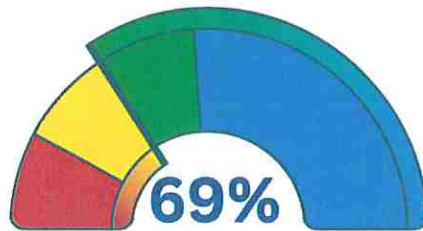
<b>Admin Managed Incidents</b>	<b>76</b>	<b>125</b>
<b>Teacher Managed Incidents</b>	<b>183</b>	<b>209</b>
<b>Suspensions</b>	<b>10</b>	<b>28</b>
<b>Bullying</b>	<b>5</b>	<b>5</b>

# ACADEMIC DATA READING

## Kindergarten BOY-MOY

Beginning of Year

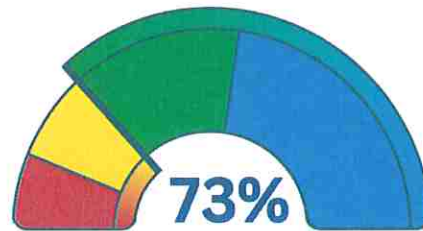
Aug 18 - Sep 2, 2025



140

Middle of Year

Dec 8 - Dec 9, 2025

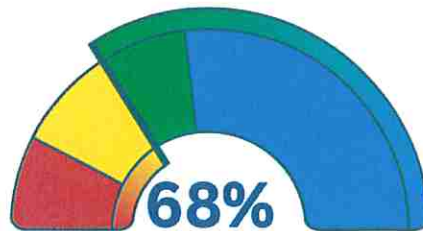


139

## 1st Grade BOY-MOY

Beginning of Year

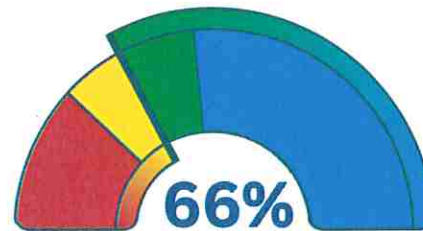
Aug 18 - Sep 2, 2025



132

Middle of Year

Dec 8 - Dec 9, 2025



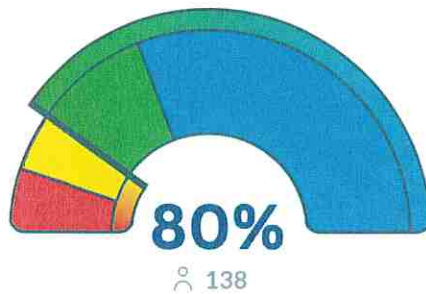
134

# ACADEMIC DATA READING

## 2nd Grade BOY-MOY

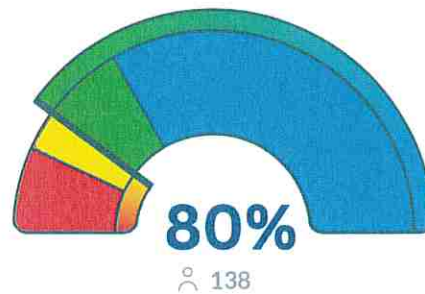
**Beginning of Year**

Aug 18 - Sep 2, 2025



**Middle of Year**

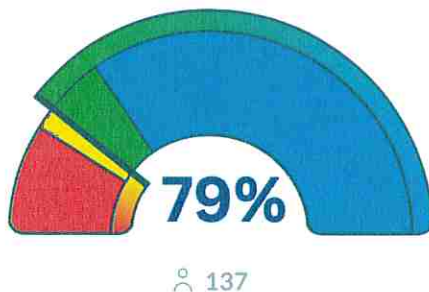
Dec 8 - Dec 9, 2025



## 3rd Grade BOY-MOY

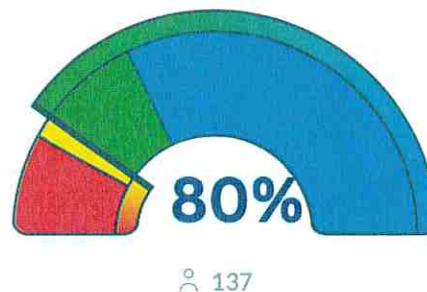
**Beginning of Year**

Aug 18 - Sep 2, 2025



**Middle of Year**

Dec 8 - Dec 9, 2025



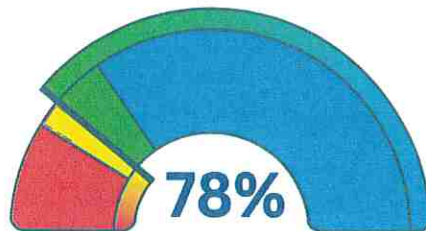


# ACADEMIC DATA READING

## 4th Grade BOY-MOY

**Beginning of Year**

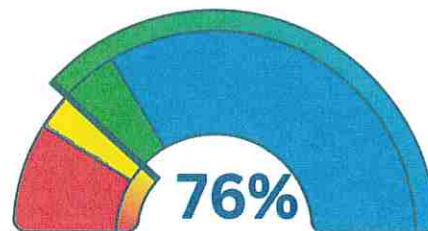
Aug 18 - Sep 2, 2025



131

**Middle of Year**

Dec 8 - Dec 9, 2025

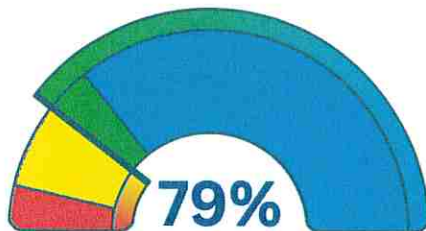


131

## 5th Grade BOY-MOY

**Beginning of Year**

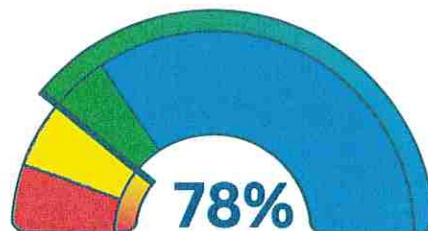
Aug 18 - Sep 2, 2025



138

**Middle of Year**

Dec 8 - Dec 9, 2025



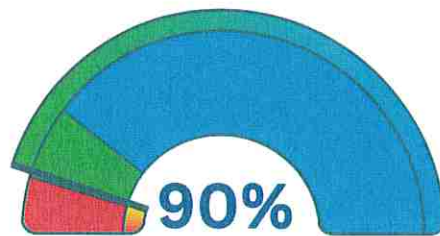
138

# ACADEMIC DATA READING

## 6th Grade BOY-MOY

Beginning of Year

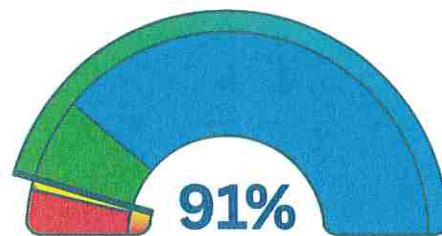
Aug 18 - Sep 2, 2025



111

Middle of Year

Dec 8 - Dec 9, 2025



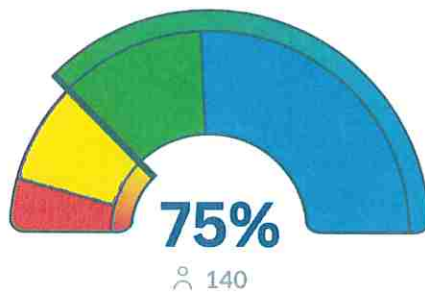
112

# ACADEMIC DATA MATH

## Kindergarten BOY-MOY

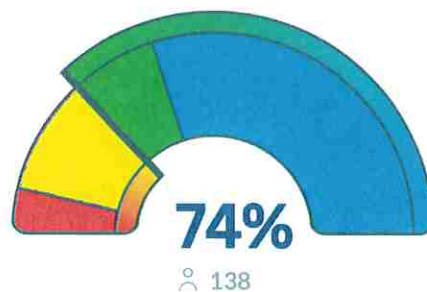
Beginning of Year

Aug 18 - Sep 9, 2025



Middle of Year

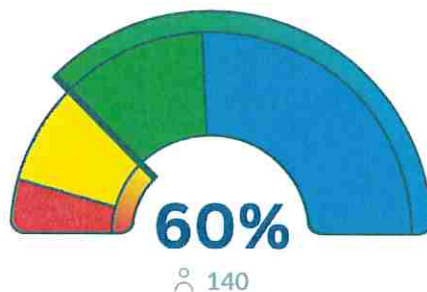
Dec 1 - Dec 9, 2025



## 1st Grade BOY-MOY

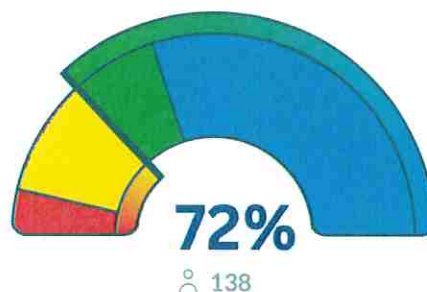
Beginning of Year

Aug 18 - Sep 9, 2025



Middle of Year

Dec 1 - Dec 9, 2025



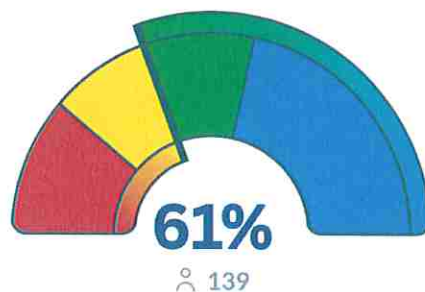


# ACADEMIC DATA MATH

## 2nd Grade BOY-MOY

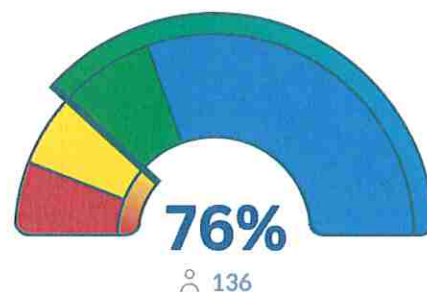
**Beginning of Year**

Aug 18 - Sep 9, 2025



**Middle of Year**

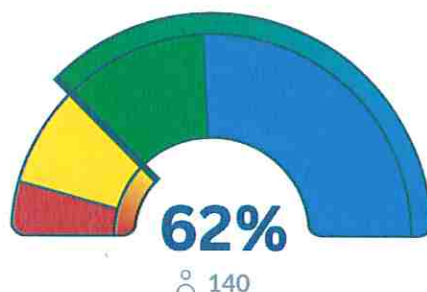
Dec 1 - Dec 9, 2025



## 3rd Grade BOY-MOY

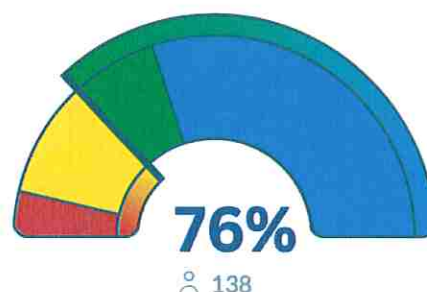
**Beginning of Year**

Aug 18 - Sep 9, 2025



**Middle of Year**

Dec 1 - Dec 9, 2025



# 24 – 25 UTAH REPORT CARD



Commendable

## ACHIEVEMENT

English Language Arts	57.8%
Mathematics	57.9%
Science	69.9%

[View Details](#)



Exemplary

## GROWTH

English Language Arts	55.8%	High
Mathematics	67.6%	High
Science	59.5%	High
Growth of Lowest 25%	73.9%	Average

[View Details](#)



Developing

## ENGLISH LEARNER PROGRESS

English Learners' Adequate Progress	37.0%
English Learners Reaching Proficiency	7.4%

(see attached GWA action plan)

[View Details](#)



## EARLY LITERACY

Students Reading on Grade Level	63.2%
Students Making Typical or Better Progress	72.6%

[View Details](#)

## **TBD ELL Reading Action Plan (2025–2026)**

**Purpose:** Increase reading growth for English Learners through language-rich Tier 1 instruction, targeted Tier 2 supports, and intensive Tier 3 interventions aligned to WIDA Standards and Utah Core.

### **Data Snapshot**

- Adequate Progress: 37% (School) | 34% (State)
- Reaching Proficiency: 7% (School) | 10% (State)
- The trend reflects small cohort size, newcomer enrollment, and increased language demands.

### **2025–26 Reading Goal**

Increase English Learner reading growth by strengthening core language instruction and aligning interventions to both language development and literacy outcomes.

**Targets:** Increase Adequate Progress to 35–40% and stabilize year-over-year growth.

### **Tier 1: Core Reading Instruction (WIDA + Utah Core)**

**WIDA Alignment:** Language for Language Arts (Standard 1); Key Language Uses—Narrate, Inform, Argue

**Utah Core Alignment:** Reading Literature & Informational Text, Vocabulary Acquisition, Speaking & Listening

- Explicit language objectives embedded in ELA lessons
- Sentence frames and structured academic discourse
- Explicit instruction in Tier 2 vocabulary and syntax
- Frequent oral rehearsal tied to grade-level texts

### **Tier 2: Targeted Reading Support**

**WIDA Alignment:** Differentiation by language proficiency; Scaffolding using Can Do Descriptors

**Utah Core Alignment:** Foundational Skills, Fluency, Text Comprehension

- Individual ELL Reading Profiles (decoding, fluency, vocabulary, comprehension)
- Short, frequent interventions (15–20 minutes, 3–4x/week)
- Interventions aligned to classroom texts and academic language demands

### **Tier 3: Intensive Language & Literacy Support**

**WIDA Alignment:** Entering–Developing proficiency supports; Multimodal scaffolds

**Utah Core Alignment:** Foundational Reading Skills & Language Standards

- Daily oral language development and phonics/morphology instruction



- Visual supports, modeling, and structured routines
- Collaborative planning between classroom, ELL Team and Reading Center

### **PLC & Shared Accountability**

- ELL students included in grade-level collaborative meeting data discussions
- Instructional decisions guided by reading and language data
- Ongoing adjustment based on progress monitoring

### **Family & Student Engagement**

- Home reading strategies provided in accessible formats and languages
- Access to SORA audiobooks and/or leveled texts
- Students track reading growth and celebrate progress milestones

### **Expected Outcome**

English Learners demonstrate consistent reading growth. Teachers will gain new Tier 1 and Tier 2 instructional strategies to support ELL in their classroom.

**These Minutes are Pending Board Approval**

**Mission Statement:** "ACADEMICS. LEADERSHIP. COMMUNITY."

## **George Washington Academy**

**Thursday December 11, 2025**

**7:00 p.m.**

### **Board Meeting Agenda**

**Location:** George Washington Academy  
2277 South 3000 East  
St. George, Utah  
Learning Lab

*The Board meeting convened at 7:00 p.m.*

**Board Welcome:** Shannon Greer, President

**Roll Call:** Shannon Greer

**Prayer:** Kevin Peterson

**Pledge of Allegiance:** Shannon Greer

Board Members Present: Laura Snelson, Sharna Rowe, Casey Unrein, Laura Pressley, Kevin Peterson, Shannon Greer, Brady Pearce via Zoom, Blake Clark, and Shelbi Kelly.

Board Members Not Present: Rachel Richins

Others Present: Chance Manzanares, Christine Giles, Steve Erickson, Jenna Ayers and Josh Serrano

#### **Review of GWA Year Goals:**

- Academics- 85% of students will show growth in math fluency from beginning of year to end of year.
- Leadership- Teachers will lead their own professional development by sharing and modeling best practices in academic instruction and behavior support, fostering a culture of shared leadership and continuous growth.
- Community- Foster a positive school culture that motivates by embedding regular meaningful celebrations that recognize student achievement, personal growth, and staff contributions.

#### **Approval of Minutes:**

Kevin made a motion to approve the Minutes from the November 20th, 2025 Board Meeting. Laura P seconded the motion. The motion passed unanimously. All present voted in favor: Laura Snelson, Sharna Rowe, Casey Unrein, Laura Pressley, Kevin Peterson, Shannon Greer, Brady Pearce via Zoom,

**Public Opportunity to Address the Board:**

None

**Set time for adjournment**

Time set for adjournment at 9:00 pm.

**Administration Report:**

Blake reviewed the board update that was sent. He drew everyone's attention to the 7th grade data. There is a close partnership between IXL and RISE based on the rigor and format of the assessment. Looking at 7th grade from last year in the area of math at the end of the year, they were at 52% proficient. Now based on IXL, at middle of the year, they're about 67% proficient. If that continues to track that would show huge growth. The last meeting the board had asked for more data on parent participation so he pulled the numbers. The visitor average in the building is 32 parents a day with about 176 who come for events that are held in the gym. Kevin asked about the 13 suspension in one month. They were all different incidents.

**Financial Report:** Spencer gave the report. The report is as of the end of November. Everything is looking great. The majority of the state revenue has been trued up. There may be a couple of line items that need to get trued up, but for the most part the biggest buckets have been trued up at this point. It's good to know what we can anticipate for the rest of the year. You can see that there is about \$390,000 more than what was in the forecast column. We have always budgeted conservatively. Recently we have tried to make a more realistic emphasis. Revenue had a big increase. All the ratios are looking good. The state revenue true-up had an increase of 2.2%. Shannon said that Hughes, the contractor, said that there will probably be one more large additional cost for Method Studio. Spencer explained the construction line upon Casey's request.

**Committee Reports (3 min each):**

- **Policies Committee** – Nothing to report.
- **Finance Committee** – Nothing to report.
- **Audit Committee** - Nothing to report.
- **Benefits Committee** – Nothing to report.
- **Curriculum Committee** – Nothing to report.
- **Outreach Committee** – Nothing to report.
- **Technology Committee** - Nothing to report.
- **LAND Trust Committee** – Formed committee, had the first meeting.
- **PTO Committee** – Josh, the PTO President, reported that the PTO has taken over for the Health and Wellness fair. There will be an assembly 1/23 and the fair will be 1/24.
- **Board Development Committee** – Next month is intent to return and talk about filling the vacant seat.
- **Campus Management Committee** – Nothing to report.

**Discussion and/or Action Items:**



- Kevin made a motion to accept the Chromebook Replacement Plan from ProTech Castle Rock in the amount of \$39,835 to replace 155 chromebooks. Sharna seconded the motion. Casey asked about the 8 gig chromebooks that were mentioned. Steve said that a few chromebooks that are 8 gig are separate because he didn't have quotes for them yet. They are for the sixth grade team. The quote came back but they were less than the \$5,000 so they did not need to be voted on but for transparency were talked about. All present voted in favor: Laura Snelson, Sharna Rowe, Casey Unrein, Laura Pressley, Kevin Peterson, Shannon Greer, Brady Pearce via Zoom.

**Strategic Planning:** Laura Snelson led the discussion for the strategic planning. She first reviewed what we have done in the past two meetings. Academics, Academic support and enrichment, student supports, growth/facilities/demand have been identified as high impact and high effort. There was discussion about a mission statement, the question was asked - Who are we? The two options that were chosen are, High academic achievement- focused students and High growth students (who need acceleration and students who need support). The board worked on a mission statement that reflected who we want to be and who they want the school to reflect.

**Closed Meeting** – *None*

**Next Meeting:** The next regular Board Meeting will be held on January 22, 2025 at 7:00 p.m.

**Adjournment:** Board Meeting was adjourned at 9:10.

Written by Shelbi Kelly



# Financial Summary

as of December 31, 2025

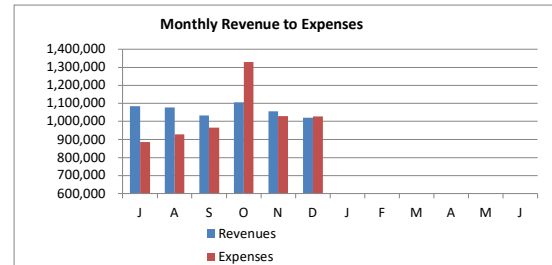
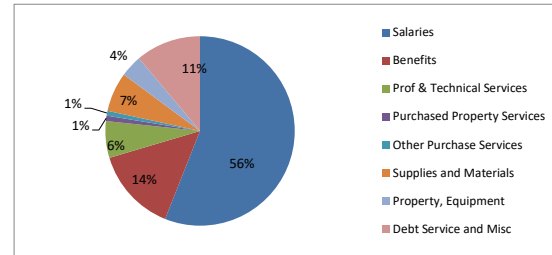
50% through the Year

## BUDGET REPORT

Green - more than 5% ahead of forecast  
Yellow - within 5% of forecast  
Red - more than 5% behind forecast

	Year-to Date Actuals	Approved Budget	Forecast	% of Forecast
Enrollment		1000	1030	
<b>Revenue</b>				
1000 Local	\$ 324,987	\$ 596,858	\$ 596,858	54%
3000 State	\$ 5,963,502	\$ 11,247,066	\$ 11,641,274	51%
4000 Federal	\$ 88,726	\$ 433,195	\$ 433,195	20%
<b>Total Revenue</b>	\$ 6,377,215	\$ 12,277,119	\$ 12,671,327	50%
<b>Expenses</b>				
100 Salaries	\$ 3,245,469	\$ 6,591,378	\$ 6,703,673	48%
200 Benefits	\$ 807,023	\$ 1,712,544	\$ 1,717,378	47%
300 Prof & Technical Services	\$ 318,971	\$ 700,900	\$ 753,437	42%
400 Purchased Property Services	\$ 55,887	\$ 108,080	\$ 108,080	52%
500 Other Purchase Services	\$ 29,315	\$ 99,075	\$ 99,075	30%
600 Supplies and Materials	\$ 455,378	\$ 801,216	\$ 801,216	57%
700 Property, Equipment	\$ 247,026	\$ 396,341	\$ 447,637	55%
800 Debt Service and Misc	\$ 658,825	\$ 1,334,712	\$ 1,334,712	49%
<b>Total Expenses</b>	\$ 5,817,894	\$ 11,744,247	\$ 11,965,209	49%
<b>Net Income from Operations</b>	\$ 559,321	\$ 532,873	\$ 706,118	79%
Operating Margin	8.8%	4.3%	5.6%	

## EXPENSES

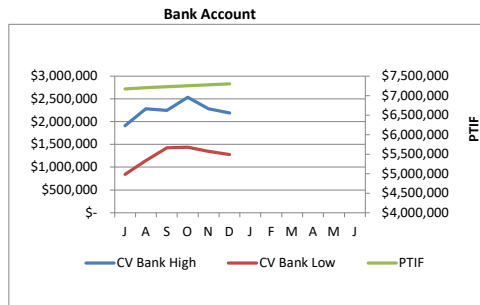


## RATIOS

	Actual	Goal	Covenant	Prior Mth Change
Operating Margin	5.57%	5%		1.9%
Debt Service Coverage	1.55	1.25	1.05	0.20
Days Cash on Hand	290	130	30	(9)
Building Payment %	10.7%	< 22%		0.0%
Unrestricted NI	\$ 706,118	\$250,000		\$ 254,988
Maintenance of Effort	\$ -	\$552		\$ -

## CASH

Month Ending Cash Balance	\$ 9,493,398	Includes \$7,303,127 PTIF
Days Cash on Hand	290	

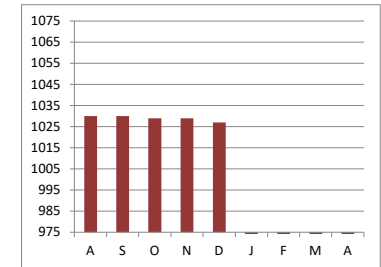


## RESERVES

	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 9,640,018	\$ 9,640,018
Reserves Added this Year	\$ 421,441	\$ 706,118
Construction	\$ (340,128)	\$ (1,000,000)
<b>New Reserve Balance</b>	<b>\$ 9,721,331</b>	<b>\$ 9,346,136</b>

## ENROLLMENT

	A	S	O	N	D	J	F	M	A
K	140	140	140	140	140				
1	138	139	138	139	135				
2	140	140	140	140	140				
3	141	141	140	141	141				
4	135	135	135	133	133				
5	138	137	139	139	140				
6	110	110	110	110	112				
7	88	88	87	87	86				
Total	1030	1030	1029	1029	1027	0	0	0	0
WPU	921.38								



Created by Red Apple



# Budget Detail Report

Actuals as of: **December 31, 2025**

Percentage of Year: **50.0%**



	(1016 Students) FY25 Actuals	Current Yr Actuals	(1000 Students) Approved Budget		1030		% Change From Prior Mth
				Changes	FY26 Forecast	% of Forecast	
<b>Revenue</b>							
1000 Revenue From Local Sources							
1510 Interest	\$ 437,000	\$ 210,114	\$ 350,000	\$ -	\$ 350,000	60.0%	18.3%
1600 Food Services	\$ 230,000	\$ 112,539	\$ 230,000	\$ -	\$ 230,000	48.9%	25.5%
1741 Student Activities and Fees	\$ 300	\$ 28	\$ 300	\$ -	\$ 300	9.3%	0.0%
1741 Textbook and Library Fees	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
1920 Donations	\$ 4,815	\$ 1,694	\$ 4,000	\$ -	\$ 4,000	42.4%	0.0%
1920 Staff Lounge	\$ 3,210	\$ 547	\$ 3,000	\$ -	\$ 3,000	18.2%	0.0%
1920 Dixie Direct Fundraiser	\$ 9,151	\$ -	\$ 8,558	\$ -	\$ 8,558	0.0%	0.0%
1930 Sales of Assets	\$ 1,000	\$ 20	\$ 1,000	\$ -	\$ 1,000	2.0%	0.0%
1990 Background Checks	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
1990 Miscellaneous Income	\$ -	\$ 45	\$ -	\$ -	\$ -	0.0%	12.5%
<b>Total 1000:</b>	<b>\$ 685,476</b>	<b>\$ 324,987</b>	<b>\$ 596,858</b>	<b>\$ -</b>	<b>\$ 596,858</b>	<b>54.4%</b>	<b>20.6%</b>
3000 Revenue From State Sources MSP							
30-3005 Regular School Program K	\$ 542,616	\$ 285,394	\$ 578,219	\$ (7,430)	\$ 570,789	50.0%	20.0%
30-3010 Regular School Program 1-12	\$ 3,563,757	\$ 1,853,544	\$ 3,692,961	\$ 14,372	\$ 3,707,333	50.0%	20.0%
30-3020 Professional Staff	\$ 243,144	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
31-1205 Sped Educ Reg Add-On WPUS	\$ 647,592	\$ 415,966	\$ 673,498	\$ 145,030	\$ 818,528	50.8%	19.2%
31-1210 Sped Educ Reg Self Contained	\$ 61,393	\$ 33,874	\$ 63,848	\$ 3,899	\$ 67,747	50.0%	20.0%
31-1220 Sped Educ Extended Year Program	\$ 4,213	\$ 2,423	\$ 4,384	\$ 462	\$ 4,846	50.0%	20.0%
31-1225 Sped Educ State Programs	\$ 9,814	\$ 5,717	\$ 10,207	\$ 1,226	\$ 11,433	50.0%	20.0%
31-1278 Sped Educ Stipends Extended Year	\$ 1,344	\$ 4,480	\$ -	\$ 4,480	\$ 4,480	100.0%	0.0%
31-5201 Class Size Reduction K-8	\$ 425,623	\$ 222,191	\$ 442,647	\$ 1,735	\$ 444,382	50.0%	20.0%
31-5344 Enhancement for At-Risk Student	\$ 141,988	\$ 71,822	\$ 147,667	\$ (8,055)	\$ 139,612	51.4%	18.7%
31-5901 Career and Tech Ed Dist. Add-On	\$ 6,342	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
31-5903 CTE Comprehensive Counseling	\$ 20,000	\$ 10,000	\$ -	\$ 20,000	\$ 20,000	50.0%	20.0%
32-0500 Charter School Base Funding	\$ 116,610	\$ 59,225	\$ 116,265	\$ 2,185	\$ 118,450	50.0%	20.0%
32-5310 Flexible Allocation	\$ 2,356	\$ 187,642	\$ 376,433	\$ (2,424)	\$ 374,009	50.2%	19.8%
32-5619 Charter School Local Replacement	\$ 3,363,438	\$ 1,868,420	\$ 3,628,000	\$ 108,840	\$ 3,736,840	50.0%	20.0%
32-5651 Educator Professional Time	\$ 102,232	\$ 110,841	\$ 107,296	\$ 3,545	\$ 110,841	100.0%	29.1%
34-5642 Elementary School Counselor Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
34-5659 Educator Support Prof Bonus	\$ -	\$ 61,209	\$ -	\$ 61,209	\$ 61,209	100.0%	0.0%
34-5666 Professional Learning Grant	\$ 8,782	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
34-5807 SHINE Teacher Salary Supplement Program	\$ -	\$ 18,521	\$ -	\$ 37,041	\$ 37,041	50.0%	20.0%
34-5868 Teacher Supplies and Materials	\$ 21,200	\$ 20,953	\$ 21,200	\$ (247)	\$ 20,953	100.0%	23.5%
34-5876 Educator Salary Adjustment	\$ 590,922	\$ 341,546	\$ 678,642	\$ 4,451	\$ 683,093	50.0%	20.0%
34-5911 ELL Software	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
35-5420 School Land Trust Program	\$ 148,100	\$ 157,343	\$ 157,343	\$ -	\$ 157,343	100.0%	0.0%
35-5655 Digital Teaching & Learning	\$ 49,660	\$ -	\$ 46,000	\$ (6,790)	\$ 39,210	0.0%	0.0%
35-5678 TSSA	\$ 253,940	\$ 152,200	\$ 304,399	\$ -	\$ 304,399	50.0%	20.0%
35-5679 School Based Mental Health Grant	\$ 54,918	\$ -	\$ 52,656	\$ -	\$ 52,656	0.0%	0.0%
35-5810 Library Books & Elective Resources	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
35-5882 Beverly Taylor Sorenson Grant	\$ 50,400	\$ 24,500	\$ 50,400	\$ (1,400)	\$ 49,000	50.0%	20.0%
38-0500 School Fees	\$ -	\$ 4,714	\$ -	\$ 4,714	\$ 4,714	100.0%	0.0%
38-5608 Mental Health Screeners	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-5618 Early Interactive Software Program	\$ 33,151	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-5654 Period Products in Schools	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-5673 Substance Prevention	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	\$ 4,000	100.0%	0.0%
38-5674 Elementary Suicide Prevention	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	\$ 1,000	100.0%	0.0%
38-5697 LETRS Professional Development Grant	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-5813 Stipends for Future Educators (Student Teacher Stipend)	\$ -	\$ 6,500	\$ -	\$ 6,500	\$ 6,500	100.0%	0.0%
38-5914 School Safety Specialist	\$ 3,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-5914 School Safety Grant	\$ 63,797	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
38-8070 School Lunch (Liquor Tax)	\$ 105,000	\$ 38,611	\$ 90,000	\$ -	\$ 90,000	42.9%	31.0%
38-8084 Summer EBT Reimbursement	\$ -	\$ 866	\$ -	\$ 866	\$ 866	100.0%	0.0%
<b>Total 3000:</b>	<b>\$ 10,640,332</b>	<b>\$ 5,963,502</b>	<b>\$ 11,247,066</b>	<b>\$ 394,208</b>	<b>\$ 11,641,274</b>	<b>51.2%</b>	<b>19.2%</b>
4000 Revenue From Federal Sources							
45-7522 IDEA Pre-School	\$ 2,544	\$ -	\$ 2,544	\$ -	\$ 2,544	0.0%	0.0%
45-7524 IDEA Flow-Through	\$ 155,946	\$ -	\$ 155,946	\$ -	\$ 155,946	0.0%	0.0%
45-8075 Free & Reduced Reimbursement	\$ 119,000	\$ 48,694	\$ 132,555	\$ -	\$ 132,555	36.7%	28.9%
45-8075 National School Lunch Program	\$ 61,990	\$ 27,285	\$ 57,480	\$ -	\$ 57,480	47.5%	31.0%
45-8075 School Breakfast Program	\$ 31,692	\$ 12,747	\$ 29,467	\$ -	\$ 29,467	43.3%	27.9%
45-8079 Local Food for Schools Co-Op	\$ 2,936	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
45-8080 Pandemic EBT	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
47-7290 CARES UEN WIFI	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
48-7801 Federal Title I A	\$ 47,055	\$ -	\$ 47,055	\$ -	\$ 47,055	0.0%	0.0%
48-7860 Federal NCLB Title II A	\$ 8,148	\$ -	\$ 8,148	\$ -	\$ 8,148	0.0%	0.0%
48-7860 Federal Title IV Repurposed to Title I	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%
<b>Total 4000:</b>	<b>\$ 429,311</b>	<b>\$ 88,726</b>	<b>\$ 433,195</b>	<b>\$ -</b>	<b>\$ 433,195</b>	<b>20.5%</b>	<b>29.4%</b>
<b>Total Revenue:</b>	<b>\$ 11,755,119</b>	<b>\$ 6,377,215</b>	<b>\$ 12,277,119</b>	<b>\$ 394,208</b>	<b>\$ 12,671,327</b>	<b>50.3%</b>	<b>19.4%</b>





		(1016 Students)			(1000 Students)			1030		
		FY25 Actuals	Current Yr Actuals	Approved Budget	Changes	FY26 Forecast	% of Forecast	% Change From Prior Mth		
Expenses										
100 Salaries										
121.2 Administration		\$ 520,202	\$ 282,657	\$ 571,276	\$ -	\$571,276	49.5%	20.2%		
131 Teachers		\$ 3,147,493	\$ 1,699,689	\$ 3,486,478	\$ -	\$3,486,478	48.8%	20.4%		
131 Special Education Salaries		\$ 332,081	\$ 191,173	\$ 380,839	\$ -	\$380,839	50.2%	19.9%		
131 Stipends / Merit Pay		\$ 66,420	\$ 65,805	\$ 106,500	\$ -	\$ 106,500	61.8%	359.9%		
131 Summer Professional Development		\$ 60,000	\$ -	\$ 60,000	\$ -	\$ 60,000	0.0%	0.0%		
131 Educator Professional Time Stipend		\$ 40,000	\$ -	\$ 40,000	\$ -	\$ 40,000	0.0%	0.0%		
131 Mental Health Stipend		\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
131 Student Teacher Stipend		\$ -	\$ -	\$ -	\$ 6,000	\$ 6,000	0.0%	0.0%		
131 SHINE Stipend		\$ -	\$ 32,500	\$ -	\$ 32,500	\$ 32,500	100.0%	0.0%		
131 Educator Support Prof Bonus		\$ -	\$ 55,763	\$ -	\$ 61,209	\$ 61,209	91.1%	0.0%		
131 LETRS Training Stipend		\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
131 TSSP After School Tutoring Stipends		\$ 12,600	\$ -	\$ 12,600	\$ -	\$ 12,600	0.0%	0.0%		
131 LAND TRUST - Stipends		\$ 9,000	\$ -	\$ 9,000	\$ -	\$ 9,000	0.0%	0.0%		
131 Special Education Stipends (After School)		\$ 1,120	\$ 4,000	\$ 1,120	\$ 4,480	\$ 5,600	71.4%	0.0%		
132 Substitute Teachers (PTO Stipend)		\$ 30,000	\$ 710	\$ 30,000	\$ -	\$ 30,000	2.4%	0.0%		
132 SpEd Substitutes		\$ 5,000	\$ -	\$ 5,000	\$ -	\$ 5,000	0.0%	0.0%		
142 Counselor		\$ 257,466	\$ 139,727	\$ 282,455	\$ -	\$282,455	49.5%	20.3%		
143 School Nurse		\$ 9,921	\$ -	\$ 10,517	\$ -	\$10,517	0.0%	0.0%		
145 Librarian / Literacy Aide		\$ 22,279	\$ 12,273	\$ 24,795	\$ -	\$24,795	49.5%	24.1%		
152 Secretaries		\$ 136,399	\$ 80,757	\$ 164,170	\$ -	\$164,170	49.2%	21.4%		
152 Board Clerk		\$ 10,000	\$ 3,377	\$ 10,000	\$ -	\$10,000	33.8%	10.8%		
161 Teacher Aides, Reading Specialists & Subs		\$ 466,997	\$ 258,194	\$ 575,993	\$ -	\$575,993	44.8%	24.6%		
161 SEE Student		\$ -	\$ -	\$ -	\$ 8,106	\$8,106	0.0%	0.0%		
161 TSSA - ELL Para's		\$ 25,350	\$ 25,350	\$ 25,350	\$ -	\$ 25,350	100.0%	32.2%		
161 LAND TRUST - K Aide/Student Support Para		\$ 37,000	\$ 22,511	\$ 37,000	\$ -	\$ 37,000	60.8%	20.8%		
161 SpEd Aides & Speech Therapist		\$ 235,040	\$ 129,637	\$ 268,517	\$ -	\$268,517	48.3%	23.9%		
162 Computer Aides		\$ 24,576	\$ -	\$ 26,051	\$ (18,000)	\$ 8,051	0.0%	0.0%		
162 Computer Aides - DTL		\$ -	\$ 12,290	\$ -	\$ 18,000	\$ 18,000	68.3%	13.2%		
182 Custodial & Maintenance		\$ 120,493	\$ 65,168	\$ 167,136	\$ -	\$167,136	39.0%	20.8%		
191 Lunch Room Aide		\$ 363,015	\$ 163,888	\$ 296,581	\$ -	\$296,581	55.3%	22.8%		
Total 100:		\$ 5,932,452	\$ 3,245,469	\$ 6,591,378	\$ 112,295	\$ 6,703,673	48.4%	24.7%		
200 Employee Benefits										
220 Social Security		\$ 422,000	\$ 211,191	\$ 473,936	\$ 500	\$ 474,436	44.5%	25.4%		
220 LAND TRUST - BENEFITS		\$ 3,000	\$ 1,722	\$ 3,000	\$ -	\$ 3,000	57.4%	20.8%		
220 SpEd Social Security		\$ 41,090	\$ 24,014	\$ 50,144	\$ -	\$ 50,144	47.9%	21.4%		
230 Retirement		\$ 275,000	\$ 145,033	\$ 297,000	\$ -	\$ 297,000	48.8%	20.0%		
240 Group Insurance		\$ 725,754	\$ 328,131	\$ 762,042	\$ -	\$ 762,042	43.1%	20.0%		
240 Mental Health		\$ 48,885	\$ 56,334	\$ 52,000	\$ 4,334	\$ 56,334	100.0%	0.0%		
240 Deductible Stipend		\$ 10,000	\$ 23,818	\$ 35,000	\$ -	\$ 35,000	68.1%	17.9%		
270 Worker's Compensation Fund		\$ 24,938	\$ 14,740	\$ 26,185	\$ -	\$ 26,185	56.3%	15.0%		
280 Unemployment Insurance		\$ 10,000	\$ 2,040	\$ 13,238	\$ -	\$ 13,238	15.4%	0.0%		
Total 200:		\$ 1,560,667	\$ 807,023	\$ 1,712,544	\$ 4,834	\$ 1,717,378	47.0%	19.5%		
300 Purchased Professional & Technical										
320 Special Education Contractors		\$ 155,000	\$ 71,573	\$ 145,000	\$ -	\$ 145,000	49.4%	24.0%		
320 Counseling Services - (FY20 LCSW-Mental Health)		\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
320 Math Center Contract		\$ 95,000	\$ 41,600	\$ 92,000	\$ -	\$ 92,000	45.2%	40.5%		
320 Guardian		\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
330 Employee Training & Development		\$ 62,232	\$ 17,891	\$ 62,232	\$ (39,232)	\$ 23,000	77.8%	74.9%		
330 Educator Prof Time - Employee Training & Development		\$ -	\$ -	\$ -	\$ 62,232	\$ 70,841	0.0%	0.0%		
330 TSSA - Training & Development (\$88,800 between PD/Travel)		\$ 50,000	\$ 2,856	\$ 50,000	\$ -	\$ 50,000	5.7%	0.0%		
330 LAND TRUST - Training & Development		\$ 24,000	\$ 14,327	\$ 24,000	\$ -	\$ 24,000	59.7%	169.0%		
330 SpEd Training & Development		\$ 6,000	\$ 4,162	\$ 6,000	\$ -	\$ 6,000	69.4%	167.7%		
330 SEDC Services		\$ 3,891	\$ 2,575	\$ 3,891	\$ -	\$ 3,891	66.2%	-52.6%		
340 Audit		\$ 17,802	\$ 11,550	\$ 16,600	\$ -	\$ 16,600	69.6%	0.0%		
345 Business Manager Services		\$ 82,308	\$ 44,890	\$ 84,777	\$ -	\$ 84,777	53.0%	27.1%		
349 Legal Services		\$ 8,000	\$ 16,452	\$ 8,000	\$ 12,000	\$ 20,000	82.3%	16.1%		
350 Technical Services (IT)		\$ 156,258	\$ 77,649	\$ 147,600	\$ 8,928	\$ 156,528	49.6%	20.2%		
580 Admin & Teacher Travel (Meals)		\$ 7,000	\$ 3,041	\$ 7,000	\$ -	\$ 7,000	43.4%	15.6%		
580 TSSA - Travel (\$88,800 between PD/Travel)		\$ 38,800	\$ 1,879	\$ 38,800	\$ -	\$ 38,800	4.8%	0.0%		
580 LAND TRUST - Travel		\$ 6,000	\$ 3,810	\$ 6,000	\$ -	\$ 6,000	63.5%	0.0%		
580 SpEd - Travel		\$ 5,500	\$ 2,908	\$ 5,500	\$ -	\$ 5,500	52.9%	59.4%		
580 SpEd Contracted Employee Travel		\$ 4,101	\$ 1,808	\$ 3,500	\$ -	\$ 3,500	51.7%	0.0%		
Total 300:		\$ 721,892	\$ 318,971	\$ 700,900	\$ 43,928	\$ 753,437	42.3%	27.4%		
400 Purchased Property Services										
411 Water/Sewage		\$ 12,000	\$ 6,621	\$ 12,000	\$ -	\$ 12,000	55.2%	18.2%		
411 Water Rights		\$ 1,000	\$ -	\$ 1,000	\$ -	\$ 1,000	0.0%	0.0%		
412 Disposal Services		\$ 17,328	\$ 6,008	\$ 15,480	\$ -	\$ 15,480	38.8%	0.0%		
420 Cleaning Services		\$ 6,500	\$ 600	\$ 6,500	\$ -	\$ 6,500	9.2%	0.0%		
431 Lawn Care Services		\$ 16,100	\$ 8,690	\$ 16,100	\$ -	\$ 16,100	54.0%	10.8%		
431 Non-Technology Repairs & Maintenance		\$ 36,000	\$ 33,968	\$ 57,000	\$ -	\$ 57,000	59.6%	6.8%		
432 Copy Machine Servicing		\$ 3,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%		
Total 400:		\$ 91,928	\$ 55,887	\$ 108,080	\$ -	\$ 108,080	51.7%	7.7%		
500 Other Purchased Services										
518 Field Trips / Bus Rental		\$ 3,000	\$ 2,900	\$ 5,000	\$ -	\$ 5,000	58.0%	0.0%		
522 Property & Liability Insurance		\$ 58,403	\$ 9,393	\$ 63,075	\$ -	\$ 63,075	14.9%	0.0%		
530 Telephone		\$ 11,000	\$ 752	\$ 11,000	\$ -	\$ 11,000	6.8%	16.4%		
540 Marketing		\$ 9,000	\$ 16,270	\$ 20,000	\$ -	\$ 20,000	81.4%	20.3%		
Total 500:		\$ 81,403	\$ 29,315	\$ 99,075	\$ -	\$ 99,075	29.6%	10.8%		

		(1016 Students)		(1000 Students)		1030			% Change From Prior Mth
		FY25 Actuals	Current Yr Actuals	Approved Budget	Changes	FY26 Forecast	% of Forecast		
600 Supplies and Materials									
610a	Classroom Supplies	\$ 78,000	\$ 49,566	\$ 87,000	\$ -	\$ 87,000	57.0%	7.0%	
610a	TSSA - Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
610a	LAND TRUST	\$ 3,000	\$ 299	\$ 3,000	\$ -	\$ 3,000	10.0%	0.0%	
610b	Special Ed Supplies	\$ 10,000	\$ 7,888	\$ 10,000	\$ -	\$ 10,000	78.9%	9.4%	
610	Elective Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
610c	Theatre Supplies	\$ 7,000	\$ 1,579	\$ 7,000	\$ -	\$ 7,000	22.6%	0.0%	
610d	CCA Expenses	\$ 5,179	\$ 3,163	\$ 5,179	\$ -	\$ 5,179	61.1%	0.1%	
610e	Student Activity Supplies / Incentives	\$ 14,000	\$ 7,858	\$ 14,000	\$ -	\$ 14,000	56.1%	56.4%	
610f	Board Expenses/meals	\$ 10,000	\$ 5,842	\$ 10,000	\$ -	\$ 10,000	58.4%	48.4%	
610g	Office Supplies/General	\$ 40,000	\$ 19,304	\$ 40,000	\$ -	\$ 40,000	48.3%	8.0%	
610h	Safety Supplies	\$ 4,000	\$ 1,932	\$ 4,000	\$ -	\$ 4,000	48.3%	8.2%	
	School Safety Grant	\$ 3,133	\$ 842	\$ -	\$ -	\$ -	0.0%	0.0%	
610i	GWA Gives Back	\$ 1,300	\$ -	\$ 1,300	\$ -	\$ 1,300	0.0%	0.0%	
610j	First Aid Supplies	\$ 1,000	\$ 12	\$ 1,000	\$ -	\$ 1,000	1.2%	0.0%	
610k	Director Discretionary Fund	\$ 10,000	\$ 3,701	\$ 10,000	\$ -	\$ 10,000	37.0%	2.9%	
610m	Staff Lounge	\$ 8,045	\$ 3,723	\$ 8,000	\$ -	\$ 8,000	46.5%	4.9%	
610n	Swag Store	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
610o	Christmas Party	\$ 5,000	\$ 4,258	\$ 5,000	\$ -	\$ 5,000	85.2%	1844.3%	
610p	Health and Wellness	\$ 3,000	\$ 1,738	\$ 3,000	\$ -	\$ 3,000	57.9%	0.0%	
610q	Non Food Lunch Supplies	\$ 33,664	\$ 11,221	\$ 30,000	\$ -	\$ 30,000	37.4%	15.0%	
621	Natural Gas	\$ 8,569	\$ 884	\$ 14,000	\$ -	\$ 14,000	6.3%	44.7%	
622	Electricity	\$ 47,184	\$ 29,041	\$ 43,000	\$ -	\$ 43,000	67.5%	6.5%	
630	School Lunch Prgm	\$ 263,748	\$ 142,809	\$ 250,000	\$ -	\$ 250,000	57.1%	22.6%	
641	Textbooks/Curriculum	\$ 33,694	\$ 58,621	\$ 33,694	\$ 26,000	\$ 59,694	98.2%	3.2%	
641	TSSA - Curriculum	\$ 50,700	\$ 49,327	\$ 50,700	\$ -	\$ 50,700	97.3%	0.0%	
641	UCCRSC	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
641	Digital Teaching & Learning Curriculum	\$ 34,600	\$ -	\$ 26,000	\$ (26,000)	\$ -	0.0%	0.0%	
641	SpEd - Textbooks/Curriculum	\$ 44,855	\$ 2,467	\$ 44,855	\$ -	\$ 44,855	5.5%	0.0%	
644	Library Books	\$ 4,000	\$ 916	\$ 4,000	\$ -	\$ 4,000	22.9%	2.0%	
650	Tech Related Supplies	\$ 5,140	\$ 4,929	\$ 5,140	\$ -	\$ 5,140	95.9%	0.0%	
650	SpEd - Tech Related Supplies	\$ 1,448	\$ -	\$ 1,448	\$ -	\$ 1,448	0.0%	0.0%	
670	Educational Software	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
670	Early Interactive Software - Educational Software	\$ 33,151	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
670	TSSA - Educational Software (\$86,900 between hardware/software)	\$ 26,500	\$ 675	\$ 26,500	\$ -	\$ 26,500	2.5%	0.0%	
670	LAND TRUST - Educational Software	\$ 20,000	\$ 17,910	\$ 20,000	\$ -	\$ 20,000	89.6%	19.0%	
670	SpEd - Educational Software	\$ 3,400	\$ -	\$ 3,400	\$ -	\$ 3,400	0.0%	0.0%	
680	Maintenance Supplies & Material	\$ 40,000	\$ 24,873	\$ 40,000	\$ -	\$ 40,000	62.2%	0.2%	
Total 600:		\$ 853,310	\$ 455,378	\$ 801,216	\$ -	\$ 801,216	56.8%	12.1%	
700 Property									
710	Land and Site Improvements & Building	\$ 73,000	\$ 74,213	\$ 73,000	\$ 7,000	\$ 80,000	92.8%	206.4%	
710	School Safety Grant	\$ 50,000	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
733	Furniture and Fixtures	\$ 20,000	\$ 5,347	\$ 20,000	\$ -	\$ 20,000	26.7%	0.0%	
733	SpEd - Furniture and Fixtures	\$ 1,296	\$ 1,152	\$ 1,296	\$ -	\$ 1,296	88.9%	0.0%	
734	Technology Hardware	\$ -	\$ 2,746	\$ -	\$ 3,000	\$ 3,000	91.5%	0.0%	
734	TSSA - Tech Hardware (\$86,900 between hardware/software)	\$ 1,400	\$ -	\$ 1,400	\$ -	\$ 1,400	0.0%	0.0%	
734	LAND TRUST - Hardware	\$ 55,000	\$ 24,586	\$ 55,000	\$ -	\$ 55,000	44.7%	547.9%	
734	SpEd - Tech Hardware	\$ 345	\$ -	\$ 345	\$ -	\$ 345	0.0%	0.0%	
734	Digital Teaching & Learning Hardware	\$ 15,000	\$ 19,000	\$ 20,000	\$ (1,000)	\$ 19,000	100.0%	0.0%	
734	School Safety Grant	\$ 10,833	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
736	Technology Software	\$ -	\$ 7,807	\$ 12,500	\$ -	\$ 12,500	62.5%	0.0%	
736	TSSA - Software (\$86,900 between hardware/software)	\$ 48,000	\$ 48,000	\$ 48,000	\$ -	\$ 48,000	100.0%	0.0%	
736	LAND TRUST - Software	\$ -	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
736	SpEd - Software	\$ 1,800	\$ 1,747	\$ 1,800	\$ -	\$ 1,800	97.1%	0.0%	
736	Digital Teaching & Learning Software	\$ -	\$ 2,200	\$ -	\$ 2,200	\$ 2,200	100.0%	0.0%	
736	School Safety Grant	\$ 473	\$ -	\$ -	\$ -	\$ -	0.0%	0.0%	
739	Kitchen Equipment	\$ 13,000	\$ 33,416	\$ 13,000	\$ 33,416	\$ 46,416	72.0%	0.0%	
790	Cap Ex Fund	\$ 150,000	\$ 26,812	\$ 150,000	\$ -	\$ 150,000	17.9%	11.9%	
790	Cap Ex Reimbursable	\$ -	\$ -	\$ -	\$ 6,680	\$ 6,680	0.0%	0.0%	
Total 700:		\$ 440,147	\$ 247,026	\$ 396,341	\$ 51,296	\$ 447,637	55.2%	112.9%	
800 Debt Service & Miscellaneous									
810	Dues and Fees	\$ 19,000	\$ 13,636	\$ 19,000	\$ -	\$ 19,000	71.8%	4.1%	
830	Bond Restricted Assets (Interest)	\$ 436,912	\$ 234,756	\$ 436,912	\$ -	\$ 436,912	53.7%	20.0%	
840	Bond Restricted Assets (Principal)	\$ 845,000	\$ 407,500	\$ 845,000	\$ -	\$ 845,000	48.2%	20.0%	
833	Bond Fees	\$ 33,800	\$ 2,900	\$ 33,800	\$ -	\$ 33,800	8.6%	0.0%	
890	Miscellaneous	\$ -	\$ 33	\$ -	\$ -	\$ -	0.0%	0.0%	
Total 800:		\$ 1,334,712	\$ 658,825	\$ 1,334,712	\$ -	\$ 1,334,712	49.4%	19.5%	
Total Expenses:		\$ 11,016,511	\$ 5,817,894	\$ 11,744,247	\$ 212,353	\$ 11,965,209	48.6%	24.3%	
Net Income:		\$ 738,608	\$ 559,321	\$ 532,873	\$ 181,855	\$ 706,118	79.2%		
		Goal for Unrestricted Net Income:			\$ 250,000	Restricted Forecasted Spend Down			
		Unrestricted Net Income:			\$ 706,118	Food Service \$ (106,183)			
					\$ -	SpEd \$ 137,880			
Cap Ex Fund:		At year end:			\$ 283,600	Use: \$0	At year end:	\$ 406,788	
(Unrestricted over \$350,000) Special Project Fund:		Beg of Year			\$ 537,979		At year end:	\$ 894,097	
					35% SpEd Unrestricted			\$ 286,485	
Fund Reserve:		\$ 10,061,459			\$ 10,346,136				

# GEORGE WASHINGTON ACADEMY

## Balance Sheet

As of December 31, 2025

	Dec 31, 25
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
1072 · Bill.com Money Out Clearing	-62.53
<b>8110 · Cash in Banks</b>	
8111 · Cache Valley Bank Accounts	
1 · Petty Cash	179.07
8111.1 · Cache Valley Bank (2050)	98,929.00
8111.3 · Cache Valley Checking (8114)	2,091,162.43
<b>Total 8111 · Cache Valley Bank Accounts</b>	2,190,270.50
8116 · PTIF	7,303,127.24
<b>8120 · US Bank Accounts</b>	
8120.1C · Principal Fund 2015 (80001)	305,295.13
8120.2 · Interest Fund 2008 (9002)	0.02
8120.2B · Interest Fund 2011 (5001)	0.01
8120.2C · Interest Fund 2015 (80002)	111,340.49
8120.3C · Reserve Fund 2015 (80003)	1,285,912.50
8120.5C · Repair & Rplcmnt 2015 (80005)	150,000.00
8120.6C · Expense Fund 2015 (80006)	81,044.41
<b>Total 8120 · US Bank Accounts</b>	1,933,592.56
<b>Total 8110 · Cash in Banks</b>	11,426,990.30
<b>Total Checking/Savings</b>	11,426,927.77
<b>Other Current Assets</b>	
8130 · Accounts Recievable	
8135 · Utah State Sales Tax	3,896.57
<b>Total 8130 · Accounts Recievable</b>	3,896.57
8150 · Prepaid Expenses	1,977.78
<b>Total Other Current Assets</b>	5,874.35
<b>Total Current Assets</b>	11,432,802.12
<b>TOTAL ASSETS</b>	<b>11,432,802.12</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
9513 · Accounts Payable-bill.com	3,702.75
<b>Total Accounts Payable</b>	3,702.75
<b>Credit Cards</b>	
9531 · Visa Card	
9531a · VISA Card - Jessica's Card	3,878.30
9531b · VISA Card - Blake's Card	108.00
<b>Total 9531 · Visa Card</b>	3,986.30
<b>Total Credit Cards</b>	3,986.30
<b>Other Current Liabilities</b>	
9510 · Accounts Payable	546.85
9530 · Accrued Liabilities	
9535 · Accrued Bond Liability	440,700.00
<b>Total 9530 · Accrued Liabilities</b>	440,700.00
9540 · Accrued Salaries & Withholdings	
9544 · Utah State Withholding	20,688.00
<b>Total 9540 · Accrued Salaries &amp; Withholdings</b>	20,688.00



# GEORGE WASHINGTON ACADEMY

## Balance Sheet

As of December 31, 2025

	Dec 31, 25
9540a · Payroll & Benefit YE Accrual	385,197.21
9560 · Deferred Revenue	
9561 · Local	25,285.25
Total 9560 · Deferred Revenue	25,285.25
Total Other Current Liabilities	872,417.31
Total Current Liabilities	880,106.36
Total Liabilities	880,106.36
Equity	
30000 · Opening Balance Equity	193.93
9820 · Net Assets - Restricted	274,126.04
9830 · Retained Earnings	9,635,684.77
9850 · Unreserved Fund Balances	7,398.97
9859 · Undesignated Fund Balance	422,122.16
Net Income	213,169.89
Total Equity	10,552,695.76
TOTAL LIABILITIES & EQUITY	11,432,802.12

# COACHING PROPOSAL: ROLES TUNE-UP

*BUILDING CAPACITY, REDUCING DEPENDENCY, AND  
STRENGTHENING SUCCESSION READINESS*



Prepared by  
**MARCI HOUSEMAN**

801-449-0246

7984 South 1300 East

Sandy, UT 84094

[marci.houseman@chasing-impact.com](mailto:marci.houseman@chasing-impact.com)

## PURPOSE

The leadership team at George Washington Academy is at a critical inflection point. While individual leaders remain committed, the system that supports shared leadership has weakened over time. Roles have blurred, responsibility has concentrated unevenly, and a culture of dependency has quietly taken hold.

This proposal outlines a Roles Tune-Up—a structured coaching and facilitation process designed to restore clarity, rebuild trust, and intentionally build leadership capacity across the team. This work is not about evaluating people. It is about redesigning the system so the school can thrive regardless of who occupies each role.

This work is, at its core, succession planning.

## WHY THIS WORK MATTERS NOW

Leadership teams can change even when the names around the table stay the same. Trust erosion, overload, and unclear expectations alter how teams function—and over time, the organization pays the price.

The current moment presents both risk and opportunity:

- A culture of dependency has emerged unintentionally
- Roles and responsibilities are unevenly distributed
- Coverage gaps create strain when leaders are out
- Trust challenges have altered how the team operates
- Future leadership transitions are likely—planned or unplanned

Addressing roles and capacity now creates stability, restores confidence, and positions the school to become stronger than it has been before.

## THE ROLES TUNE-UP: WHAT IT IS

The Roles Tune-Up is a system-level leadership intervention focused on:

- Clarifying roles without names attached
- Diagnosing leadership capacity across the team
- Redistributing responsibility intentionally
- Building skills needed to meet role expectations
- Creating coverage and continuity
- Reducing dependency and increasing shared ownership

The work emphasizes roles before people, systems before personalities, and capacity before crisis.

## STRUCTURE & TIMELINE

Each site visit includes:

- 2-hour facilitated workshop (embedded into the existing Monday leadership meeting)
- In-person coaching office hours immediately following (optional and confidential)

### **Site Visit #1 — Launch & Diagnosis (February/March)**

Focus: Seeing the system clearly

- Hopes & Fears Protocol to surface aspirations and concerns
- Diagnose where role imbalance has created dependency or avoidance
- Define core leadership responsibilities (no names attached)
- Identify role overlaps, gaps, and pressure points

Outcome: Shared understanding of the current system and where it needs tuning.

### **Site Visit #2 — Capacity Building & Redistribution (April/May)**

Focus: Aligning responsibility with capability

- Assess capacity needed to meet role expectations
- Identify training, coaching, or experience required
- Redistribute responsibilities to reduce overload and bottlenecks
- Apply a succession lens: What breaks if someone steps out?

Outcome: A clearer, more balanced leadership structure with a plan to grow capacity.

### **Site Visit #3 — Accountability & Sustainability (June/August)**

Focus: Making the change stick

- Finalize the roles and responsibilities map
- Establish shared accountability and coverage norms
- Reassess succession readiness and remaining risks
- Set leadership commitments moving into the next school year

Outcome: A sustainable system that supports continuity, trust, and growth.



## DELIVERABLES

By the conclusion of the Roles Tune-Up, the school will have:

- A clear, role-based leadership responsibility map
- Defined minimum capacity expectations for leadership roles
- A plan for building capacity across the team
- Reduced dependency on individual leaders
- Stronger coverage during absences
- Increased succession readiness by design
- A leadership culture grounded in shared ownership and accountability

## INVESTMENT

Total Investment: \$15,000

Includes:

- Three on-site visits
- Six hours of facilitated workshops
- In-person coaching office hours at each visit
- Custom design and preparation
- Post-visit synthesis and guidance
- Ongoing email/phone support between visits

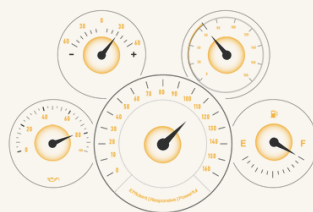
This investment reflects the depth, sensitivity, and strategic importance of the work and aligns with typical board-approved pricing for system-level leadership coaching engagements.

Travel: billed at cost with pre-approval; economy airfare or mileage at IRS rate; hotel at state per-diem class or better.

## CLOSING PERSPECTIVE

This work is not about fixing people. It is about tuning the system so leadership responsibility is clear, capacity is built intentionally, and trust can be restored over time.

When roles are clear, capacity is shared, and accountability is collective, organizations regain momentum—and are prepared for whatever transitions lie ahead.





## **PROPOSAL FOR BOARD ACTION**

**Proposal Title:** Policy 365: E-Bike, Electric Scooter, and Other Personal Wheeled Transportation

**Submitted by:** Debbie Kauvaka

**Originating Committee:** Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

As students are now permitted to walk and ride bikes on campus, we have identified the need to establish a policy that sets clear guidelines for the use of e-bikes, electric scooters, and other wheeled transportation, while minimizing potential liability risks to GWA.

### **Background Information, including a list of reviewing committees:**

This was created to promote the safety of students who ride these devices or bikes and to safeguard others in the surrounding areas on campus.

### **Assessment:**

An assessment of current campus transportation practices indicates a need for a formal policy establishing clear guidelines for the use of e-bikes, electric scooters, and other wheeled transportation, in order to address safety concerns and mitigate potential liability risks to GWA.

### **Recommendation:**

It is recommended that the Board approve the development and implementation of a policy governing the use of e-bikes, electric scooters, and other wheeled transportation to enhance safety and mitigate potential liability risks to GWA.

Please submit this form with all accompanying paperwork to the Board Clerk, Shelbi Kelly, at [skelly@gwacademy.org](mailto:skelly@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

# 365 - E-Bikes, Electric Scooters and Other Personal Wheeled Transportation Policy



## Purpose

George Washington Academy (“GWA”) seeks to promote student and staff safety on campus, ensure orderly movement of pedestrians and vehicles, and establish clear expectations for the possession and use of electric bicycles (e-bikes), electric scooters, and personal wheeled transportation.

## Definitions

For this policy:

- E-Bike: A bicycle equipped with an electric motor used to assist propulsion.
- Electric Scooter: A self-propelled stand-up scooter powered by electricity.
- Personal Wheeled Devices: Includes hoverboards, electric skateboards, kick scooters and bikes (non-motorized), and other similar devices.
- Campus: All GWA property, including parking lots, sidewalks, walkways, plazas, athletic areas, and building interiors unless otherwise specified.

## Scope

This policy applies to:

- All students, families, staff, contractors, and visitors are expected to adhere to this policy while on GWA property.
- All times during school hours, extracurricular activities, after-school care programs, and special events on campus.

## General Requirements

1. Helmets & Safety Gear
  - a. Students *riding* any wheeled device to or from school must wear a helmet that meets recognized safety standards. Additional protective gear (knee/elbow pads) is strongly recommended.
2. Parking & Storage
  - a. E-bikes, electric scooters, and non-motorized wheeled devices must be parked in designated racks or storage areas immediately upon arrival.
  - b. Devices must be powered off and secured with a lock if possible.
  - c. Devices may not be stored inside classrooms unless expressly permitted by a teacher or administrator (e.g., for special circumstances).

## Prohibited Use on Campus

Except as noted below, *riding* any powered device on campus during school hours is not permitted. This includes:

- Riding on sidewalks, walkways, parking lots, and drive aisles.
- Riding during class change, lunch periods, assemblies, or athletic events.

## 365 – E-Bikes, Electric Scooters and Other Personal Wheeled Transportation Policy (cont.)

---

### Exception:

With written permission from a school administrator (for students with medical needs or special accommodations), riding may be permitted in designated low-traffic areas and at designated times with appropriate supervision and safety measures.

### **Behavioral Expectations**

All individuals must:

- Yield to pedestrians at all times.
- Follow posted speed limits and directional signage.
- Not ride on campus steps, seating areas, or indoors.
- Follow all adult directions regarding device use or storage.

Students must also follow the GWA Behavioral Expectations and Student Code of Conduct at all times.

### **Consequences**

Violations of this policy may result in:

1. **Device Confiscation**
  - a. First violation: Device held by the school through the end of the day.
  - b. Repeat violations: Device may be held and released only to a parent/guardian.
2. **Behavior Responses**
  - a. Teacher/administrator warning or reteaching of expectations.
  - b. Parent/guardian notification.
  - c. Loss of riding privileges on campus.
  - d. Disciplinary action consistent with the Student Code of Conduct for repeated or serious infractions.

### **Liability & Safety**

GWA:

- Is not liable for damage to, loss of, or theft of any e-bike, electric scooter, or personal device brought to campus.
- Reserves the right to prohibit specific devices at school if safety concerns arise.
- Is not liable for injury that may occur while using self-transportation

Students and families are responsible for maintaining devices and ensuring they are in safe working condition.

### **Accommodation Requests**

Students with documented disabilities or special needs may request exemptions or modifications to this policy through the school's 504/IEP or administrative process. Requests will be handled in a timely manner in compliance with applicable laws.





## **PROPOSAL FOR BOARD ACTION**

**Proposal Title:** Procedure 126 - GWA Trust Land Council Election Procedures

**Submitted by:** Debbie Kauvaka

**Originating Committee:** Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

The Land Trust Committee was informed of the need to establish a formal procedure for the election of Land Trust Council members, in compliance with state law and administrative rules, which must be approved by the School Board.

### **Background Information, including a list of reviewing committees:**

Following a review of applicable state law and administrative rules, the Land Trust Committee was informed of the need to establish a formal procedure for the election of Land Trust Council members. It was further noted that this procedure must comply with state requirements and receive approval from the School Board. The Land Trust Committee created this procedure and the Policies Committee reviewed it and made updates.

### **Assessment:**

Based on an assessment of existing policies and procedures, it was determined that a School Board–approved process for the election of Land Trust Council members is necessary to ensure compliance with state law and administrative rules.

### **Recommendation:**

It is recommended that the Board approve a School Board–approved election procedure for Land Trust Council members to ensure compliance with state law and administrative regulations.

Please submit this form with all accompanying paperwork to the Board Clerk, Shelbi Kelly, at [skelly@gwacademy.org](mailto:skelly@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.

George Washington Academy (GWA) has established a Charter Trust Land Council in accordance with state law and administrative rule. Modifications to this specific procedure must have board approval per Trust Land Requirements.

1. **Charter Trust Land Council (the “Council”) Composition Requirements.** The number of Council members who are parents or grandparents of students enrolled at the school shall exceed all other members combined by at least two. Parents or grandparents must have a student actively enrolled at the charter school to be eligible to run or serve on the council.
  - a. If the School’s governing board meets the size and composition requirements above, the governing board may serve as the Council.
  - b. If the governing board does not serve as the Council, the Council shall consist of the specific number of parents/grandparents. In addition, membership may also include 2 Staff Members and 4 parents or grandparents. If only 3 parents volunteer for the committee, the committee will search for an “other member,” other members include community members that have a vested interest in GWA and the GWA Community. There must be 2 more parents than employees that serve on the committee each year.
2. **Council Size.** The Council shall consist of 6 members. Specifically, there shall be 4 parents/grandparents, the Executive director who is a voting member and 1 staff member, with the potential of 1 other member (vested GWA Community member) if the position is not filled by a parent/grandparent.
3. **Election Procedures for Parents/Grandparents.** On or before September 1, each year, the Executive Director will notify parents/guardians about Council membership opportunities and the necessary steps to become a member. Notification will be posted on the website and distributed via email and the weekly newsletter.
  - a. If the number of interested individuals exceeds the number of open positions, an election will take place. If an election is required, the school will notify families of the election process at least ten (10) days before voting commences.
    - i. Only parents of students currently attending the school are eligible to vote.
    - ii. Each parent will be given one (1) vote regardless of the number of family members that attend the school.
    - iii. Voting by secret ballot will be done via electronic survey and instructions for voting (including when voting opens/closes, submission information as well as the candidate list will be included in the election notice described in paragraph 3(a) above.)
    - iv. Absentee voting is not allowed
    - v. If two or more candidates receive the same number of votes, the Executive Director will flip a coin to determine who the committee member will be.
    - vi. The Executive Director will oversee the election to ensure compliance with these election procedures.

- b. If the number of interested individuals is less than or equal to the number of open positions, an election is not required. Appointments by the Executive Director will be made to fill any open seats.
4. **Parent/Grandparent Terms.** Terms shall be for a period of one year and members are eligible for re-election.
5. **Procedures for Staff Members and Other Members.** Staff members that are interested in joining the committee will fill out an interest survey and will be appointed by the Executive Director. Other members that may need to fill an opening will be appointed by Executive Director and chair of the committee.
6. **Staff and Other Members Terms.** Terms shall be for a period of one year and members are eligible for re-election.
7. **Officers.** Once established, the Council members shall elect from its membership a parent or grandparent of a student enrolled at the school to serve as Chair. The director may not hold an officer position.
8. **Filling Vacancies.** If a member resigns and is unable to complete their term, a new member shall be appointed. If there was an election where not all interested parents/grandparents were able to serve due to higher interest, the next interested individual that did not qualify per vote count, and was next in line for position based on vote count, shall be appointed. In a non-elected year, the Executive Director and committee chair shall appoint a parent/ grandparent or other member to serve the rest of the term.
9. **Quorum.** A quorum consists of a majority of the current members of the Council.
10. **Meetings.** The Chair shall schedule, provide notice, and convene the meetings of the Council consistent with the School Community Council Open and Public Meeting Act, 53G-7-1203.
11. **Council Responsibilities.** In accordance with state board rule regarding charter trust land council expenditures and funding limits, a Council shall:
  - a. Prepare a plan for the use of School LAND Trust Program money.
  - b. Work with students, families, and educators and hold at least an annual discussion with charter school administrators to develop and incorporate safety principles at the school level.
  - c. Provide input to the school's principal on a positive behaviors plan.



## **PROPOSAL FOR BOARD ACTION**

**Proposal Title:** New Policy 360: Suicide Prevention Policy

**Submitted by:** Debbie Kauvaka

**Originating Committee:** Policies Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

### **Situation:**

This policy was provided to the Policies Committee by Brynn Bell, our school's LCSW.

### **Background Information, including a list of reviewing committees:**

Our School Counselor, Anjanae Merida, and our LCSW, Brynn Bell attended a conference that spoke on the need for a policy on the process of preventing suicide within the school. This was previously presented to the board and was asked to be worked on to create a policy and a separate procedure. This was reviewed and modified by the counselors and the Policies Committee.

### **Assessment:**

We made some updates and separated the policy and procedures.

### **Recommendation:**

Review the attached policy for a vote and the procedures for review. We invite feedback on this version of the policy and the procedures.

Please submit this form with all accompanying paperwork to the Board Clerk, Shelbi Kelly, at [skelly@gwacademy.org](mailto:skelly@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.



Protecting the health and well-being of all students is of utmost importance to George Washington Academy. The following is our suicide prevention policy:

### **Prevention**

- The school will adopt and implement a school-wide pre-approved, grade-level appropriate curriculum. That curriculum will be taught universally by trained staff and focus on recognizing and responding to warning signs of mental health concerns, using coping skills, and seeking help for themselves and others.
- George Washington Academy will designate a suicide prevention coordinator to serve as a point of contact for students in crisis and to refer students to appropriate resources in the community.
- All school personnel will receive annual training on risk factors, warning signs, protective factors, response procedures, referrals, postvention, and resources regarding youth suicide prevention.

### **Intervention**

- When a student is identified by a peer, educator, or other source as potentially at-risk for self-harm or harming others, the student shall be seen by a school-employed mental health professional, such as a school psychologist, school counselor, school social worker, within the same school day to complete an information gathering interview, contact parent/guardian, and facilitate referral (if appropriate).
- Any GWA staff member, who believes a student is at-risk, may intervene immediately to ask the student questions about their student's suicidal thoughts, physically self-harming behavior, or thoughts of harming others for the purpose of referring the student to the school-employed mental health professional.
- Staff shall always report any written threats and expressions about self-harm, harming others, and/or death in school assignments to the appropriate school-employed mental health professional within the same day it was discovered/reported to them. The same intervention procedure above will be followed within the same school day it was reported to the mental health professional.

### Purpose

The purpose of this procedure is to protect the health and well-being of all students by having procedures in place to prevent, assess the risk of, intervene in, and respond to suicide.

George Washington Academy:

- Recognizes that physical and mental health are integral components of student outcomes, both educationally and beyond graduation
- Further recognizes that suicide is a leading cause of death among young people
- Has an ethical responsibility to take a proactive approach in preventing deaths by suicide
- Acknowledges the school's role in providing an environment that is sensitive to individual and societal factors that place youth at greater risk for suicide and helps to foster positive youth development and resilience
- Acknowledges that comprehensive suicide prevention policies include prevention, intervention, and postvention components

### Scope

This procedure covers actions that take place in the school, on school property, at school-sponsored functions and activities, on school buses or vehicles and at bus stops, and at school-sponsored out-of-school events where school staff are present. This procedure applies to the entire school community, including educators, school staff, students, parents/guardians, and volunteers. This procedure also covers appropriate school responses to suicidal or high-risk behaviors that take place outside of the school environment.

### Definitions

#### At-Risk

Suicide risk is not a dichotomous concern, but rather exists on a continuum with various levels of risk. Each level of risk requires a different level of response and intervention by the school. A student who is defined as high-risk for suicide is one who has made a suicide attempt, has the intent to die by suicide, or has displayed a significant change in behavior suggesting the onset of potential mental health conditions or a deterioration of mental health. The student may have thoughts about suicide, including potential means of death, and may have a plan. In addition, the student may exhibit behaviors or feelings of isolation, hopelessness, helplessness, and the inability to tolerate any more pain. This situation would necessitate a referral, as documented in the following procedures. The type of referral, and its level of urgency, shall be determined by the student's Crisis Team in collaboration with parents/caregivers — according to George Washington Academy policy.

#### Crisis Team

A multidisciplinary team including, at minimal, an administrative staff, a mental health professional, and a safety professional whose primary focus is to address crisis preparedness, intervention, response and recovery.

## **360 – Suicide Prevention Procedure (cont.)**

---

Crisis Team members might include someone from the administrative leadership, school psychologists, school counselors, school social workers, school nurses, resource police officers, and others including support staff and/or teachers. These professionals have been specifically trained in areas of crisis preparedness and take a leadership role in developing crisis plans, ensuring school staff can effectively execute various crisis protocols, and may provide mental health services for effective crisis interventions and recovery supports. Crisis team members who are mental health professionals may provide crisis intervention and services.

### **Mental Health**

A state of mental, emotional, and cognitive health that can impact perceptions, choices and actions affecting wellness and functioning. Mental health conditions include depression, anxiety disorders, post-traumatic stress disorder (PTSD), and substance use disorders. Mental health can be impacted by the home and social environment, early childhood adversity or trauma, physical health, and genes.

### **Risk Assessment**

An evaluation of a student who may be at-risk for suicide, conducted by the appropriate professional entity outside of the school (ie. Emergency room professionals, mental health professionals and/or mobile crisis professionals).

### **Information-Gathering Tool**

The Information-Gathering Tool (created by American School Counselor Association and adopted by George Washington Academy for use) is designed to elicit information regarding the student's intent to die by suicide, previous history of suicide attempts, presence of a suicide plan and its level of lethality and availability, presence of support systems, and level of hopelessness and helplessness, mental status, and other relevant risk factors.

### **Risk Factors for Suicide**

Characteristics or conditions that increase the chance that a person may attempt to take their life. Suicide risk is most often the result of multiple risk factors converging at a moment in time. Risk factors may encompass biological, psychological, and/or social factors in the individual, family, and environment. The likelihood of an attempt is highest when factors are present or escalating, when protective factors and healthy coping techniques have diminished, and when the individual has access to lethal means.

### **Self-Harm**

Behavior that is self-directed and deliberately results in injury or the potential for injury to oneself. Self-harm behaviors can be either non-suicidal or suicidal. Although non-suicidal self-injury (NSSI) lacks suicidal intent, youth who engage in any type of self-harm should receive mental health care. Treatment can improve coping strategies to lower the urge to self-harm and reduce the long-term risk of a future suicide attempt.

### **Suicide**

Death caused by self-directed injurious behavior with any intent to die as a result of the behavior.

## **360 – Suicide Prevention Procedure (cont.)**

---

NOTE: The coroner's or medical examiner's office must first confirm that the death was a suicide before any school official may state this as the cause of death. Additionally, parent or guardian preference shall be considered in determining how the death is communicated to the larger community.

### **Suicide Attempt**

A self-injurious behavior for which there is evidence that the person had at least some intent to die. A suicide attempt may result in death, injuries, or no injuries. A mixture of ambivalent feelings, such as a wish to die and a desire to live, is a common experience with most suicide attempts. Therefore, ambivalence is not a reliable indicator of the seriousness or level of danger of a suicide attempt or the person's overall risk.

### **Suicidal Behavior**

Suicide attempts, injury to oneself associated with at least some level of intent, developing a plan or strategy for suicide, gathering the means for a suicide plan, or any other overt action or thought indicating intent to end one's life.

### **Suicidal Ideation**

Thinking about, considering, or planning for self-injurious behavior that may result in death. A desire to be dead without a plan or the intent to end one's life is still considered suicidal ideation and shall be taken seriously.

### **Suicide Contagion**

The process by which suicidal behavior or a suicide completion influences an increase in the suicide risk of others. Identification, modeling, and guilt are each thought to play a role in contagion. Although rare, suicide contagion can result in a cluster of suicides within a community.

### **Postvention**

Suicide postvention is a crisis intervention strategy designed to assist with the grief process following suicide loss. This strategy, when used appropriately, reduces the risk of suicide contagion, provides the support needed to help survivors cope with a suicide death, addresses the social stigma associated with suicide, and disseminates factual information after the death of a member of the school community. Often a community or school's healthy postvention effort can lead to readiness to engage further with suicide prevention efforts and save lives.

## **Prevention**

A school-level suicide prevention coordinator shall be appointed by the Director or designee.

The George Washington Academy suicide prevention coordinator and Director shall be responsible for planning and coordinating implementation of this procedure for George Washington Academy. All staff members shall report students they believe to be at-risk for suicide to the school suicide prevention coordinator or appropriate school mental health professional if the coordinator is unavailable.

The George Washington Academy suicide prevention coordinator is to provide advice to the George Washington Academy administration and school board regarding suicide prevention activities and policy

## **360 – Suicide Prevention Procedure (cont.)**

---

implementation, and to keep aware of current research, data, trends, and evolving best practices. In addition, the task force can help to compile a list of community resources to assist with suicide prevention activities and referrals to community mental health providers.

### **Staff Professional Development**

All staff shall receive, at minimum, annual professional development that will include a review of the George Washington Suicide Prevention policy as well as further information on risk factors, warning signs, protective factors, response procedures, referrals, postvention, and resources regarding youth suicide prevention. The professional development shall include additional information regarding groups of students at elevated risk for suicide, including those living with mental and/or substance use disorders, those who engage in self-harm or have attempted suicide, those in out-of-home settings students, students bereaved by suicide, and those with medical conditions or certain types of disabilities. Additional professional development in risk assessment and crisis intervention shall be provided to school-employed mental health professionals and school nurses.

### **Youth Suicide Prevention Programming**

Developmentally appropriate, student-centered education materials shall be integrated into the curriculum of all K-7 classes. The content of these age-appropriate materials shall include the importance of safe and healthy choices and coping strategies focused on resiliency building,

and how to recognize risk factors and warning signs of mental health conditions and suicide in oneself and others. The content shall also include help-seeking strategies for oneself or others and how to engage school resources and refer friends for help.

### **Publication and Distribution**

George Washington Academy's Suicide Prevention Policy shall be distributed annually and be included in all student and teacher handbooks, and on the school website. All school personnel are expected to know and be accountable for following all policies and procedures regarding suicide prevention.

### **Intervention**

#### **Information-Gathering and Referral**

When a student is identified by a peer, educator or other source as potentially suicidal — i.e., verbalizes thoughts about suicide, presents overt risk factors such as agitation or intoxication, an act of self-harm occurs, or expresses or otherwise shows signs of suicidal ideation — the student shall be seen by a school-employed mental health professional, such as a school psychologist, school counselor, school social worker, within the same school day to complete an information-gathering interview and facilitate referral if necessary. Educators shall also be aware of written threats and expressions about suicide and death in school assignments. Such incidents require immediate referral to the appropriate school-employed mental health professional. If there is



### **360 – Suicide Prevention Procedure (cont.)**

---

no mental health professional available, a designated staff member (e.g., school nurse or administrator) shall address the situation according to George Washington Academy protocol until a mental health professional is brought in.

#### **For At-Risk Youth**

- School staff shall continuously supervise the student to ensure their safety until the information-gathering process is complete
- The Director and school suicide prevention coordinator shall be made aware of the situation as soon as reasonably possible
- The school-employed mental health professional or Director shall contact the student's parent or guardian, as described in the Parental Notification Involvement section and in compliance with existing state law (if applicable), and shall assist the family with urgent referral
- Urgent referral may include, but is not limited to, working with the parent or guardian to set up an outpatient mental health or primary care appointment and conveying the reason for referral to the healthcare provider; in some instances, particularly life-threatening situations, the school may be required to contact emergency services, or arrange for the student to be transported to the local Emergency Department, preferably by a parent or guardian
- The student will be released to the parent/guardian for the rest of the school day in order to allow the student's crisis team time to review safety protocols for the student's return and arrange necessary supervision and safety supports. This also allows parent/caregiver time to seek an external risk assessment and/or external mental health evaluation/services, as needed.
- If parental abuse or neglect is suspected or reported, the appropriate state protection officials (e.g., local Child Protection Services) shall be contacted in lieu of parents as per law
- Staff will ask the student's parent or guardian, and/or eligible student, for written permission to discuss the student's health with outside care providers, if appropriate

#### **When School Personnel Need to Engage Law Enforcement**

When a student is actively suicidal and the immediate safety of the student or others is at-risk (such as when a weapon is in the possession of the student), school staff shall call 911 immediately. The staff calling shall provide as much information about the situation as possible, including the name of the student, any weapons the student may have, and where the student is located. School staff may tell the dispatcher that the student is a suicidal emotionally disturbed person, or "suicidal EDP", to allow for the dispatcher to send officers with specific training in crisis de-escalation and mental illness.

#### **Parental Notification and Involvement**

The Director, designee, or school mental health professional shall inform the student's parent or guardian on the same school day, or as soon as possible, any time a student is identified as having any level of risk for suicide or if the student has made a suicide attempt (pursuant to school/state codes, unless notifying the parent will put the student at increased risk of harm).

Following parental notification and based on information gathered via the information-gathering interview, the Director, designee, or school mental health professional may offer recommendations for next steps based on

perceived student need. These can include, but are not limited to, an external risk assessment or mental health evaluation conducted by a qualified health professional or emergency service provider.

Parent/guardian will be given handouts including the “Safe Storage of Lethal Means” handout and the “Parent Guide to Suicide Prevention and Communication” handout. Both will also be emailed in follow-up correspondence to remind parent/guardian what was discussed in the meeting.

Staff will also seek parental permission, in the form of a Release of Information form, to communicate with outside mental health care providers, as applicable, regarding the student’s safety plan and access to lethal means.

### Re-Entry Procedure

For students returning to school after a mental health crisis (e.g., suicide attempt or psychiatric hospitalization), whenever possible, a school-employed mental health professional, the Director, or designee shall meet with the student’s parent or guardian, and if appropriate, include the student to discuss re-entry. This meeting shall address next steps needed to ensure the student’s readiness for return to school and plan for the first day back.

Following a student hospitalization, parents may be encouraged to inform the school counselor of the student’s hospitalization to ensure continuity of service provision and increase the likelihood of a successful re-entry.

1. A school-employed mental health professional or other designee shall be identified to coordinate with the student, their parent or guardian, and any outside health care providers. The school-employed mental health professional shall meet with the student and their parents or guardians to discuss and document a re-entry procedure and what would help to ease the transition back into the school environment (e.g., whether or not the student will be required to make up missed work, the nature of check-in/check-out visits, etc.). Any necessary accommodations shall also be discussed and documented.
2. While not a requirement for re-entry, the school may coordinate with the hospital and any external mental health providers to assess the student for readiness to return to school.
3. The designated staff person shall periodically check-in with the student to help with readjustment to the school community and address any ongoing concerns, including social or academic concerns. This may require parent/guardian permission forms to be signed in order for the student to engage in counseling/mental health services at the school.
4. The school-employed mental health professional shall check-in with the student and the student’s parents or guardians at an agreed upon interval depending on the student’s needs either on the phone or in person for a mutually agreed upon time period (e.g. for a period of three months). These efforts are encouraged to ensure the student and their parents or guardians are supported in the transition, with more frequent check-ins initially, and then fading support.
5. The administration shall disclose to the student’s teachers and other relevant staff (without sharing specific details of mental health diagnoses or clinical details) that the student is returning after a medically-related absence and may need adjusted deadlines for assignments. The school-employed mental health professional shall be available to teachers to discuss any concerns they may have regarding the student after re-entry.

6. The administration may decide that certain safety measures are appropriate upon the student's return, which may include a designated time period in which the student does not bring a backpack from home or is provided a clear backpack.

### Points to Consider When Developing Re-Entry Procedures

A school cannot require a student or their parents to provide documentation of a mental health assessment prior to re-entry following a mental health crisis. However, the following factors should be considered when determining local re-entry procedures:

- Is there adequate availability of community-based mental health providers to ensure timely administration and documentation of a student mental health status exam? (If not, the student should be referred to the Emergency Room for expedited connection with a mental health professional outside of school).
- How are necessary education services and supports being provided to the student while they're out of school? (This is particularly important for students receiving special education services — schools should bear in mind, however, that most hospital programs only allow for a limited time devoted to school work and the vast majority of waking hours will be spent in therapy and/or learning coping techniques)
- In instances where a student is deemed suicidal but not taken for assessment by their parent or guardian, personnel should follow state/George Washington Academy legal or policy requirements to ensure student safety with consideration for referral to Child Protective Services for medical neglect.

### Parental Involvement

Parents and guardians play a key role in youth suicide prevention, and it is important for George Washington Academy to involve them in suicide prevention efforts. While parents and guardians need to be informed and actively involved in decisions regarding the student's welfare, the school mental health professional should ensure that the parents' actions are in the best interest of the student. Parents and guardians should be advised to take every statement regarding suicide and a wish to die seriously, and avoid assuming that the student is simply seeking attention.

### In-School Suicide Attempts

In the case of an in-school suicide attempt, the physical and mental health and safety of the student are paramount. In these situations:

1. First aid shall be rendered until professional medical services and/or transportation can be received, following George Washington Academy emergency medical procedures
2. School staff shall supervise the student to ensure their safety
3. Staff shall move all other students out of the immediate area as soon as possible

## **360 – Suicide Prevention Procedure (cont.)**

---

4. The school-employed mental health professional or Director shall contact the student's parent or guardian. (Note: See Parental Notification and Involvement section of this document).
5. Staff shall immediately notify the Director or school suicide prevention coordinator regarding the incident of in-school suicide attempt
6. The school shall engage the crisis team as necessary to assess whether additional steps should be taken to ensure student safety and well-being, including those students who may have had emotional or physical proximity to the victim
7. The student will be immediately released to parent/guardian custody for the rest of the school day in order to allow parent/caregiver time to seek an external risk assessment and/or external mental health evaluation and crisis services, as needed.

Since self-harm behaviors are on a continuum of level and urgency, not all instances of suicidal ideation or behavior warrant hospitalization. The school-employed mental health professional or Director will recommend (but not require) an external mental health assessment, including a suicide risk assessment, which can help determine the best treatment plan and disposition.

### **Out-of-School Suicide Attempts**

If a staff member becomes aware of a suicide attempt by a student that is in progress in an out-of-school location, the staff member shall:

1. Call 911 (police and/or emergency medical services)
2. Inform the student's parent or guardian
3. Inform the school suicide prevention coordinator and Director
4. If the student contacts the staff member and expresses suicidal ideation, the staff member shall maintain contact with the student (either in person, online, or on the phone) and then enlist the assistance of another person to contact the police while maintaining engagement with the student.

### **After a Suicide Death**

The crisis response team, led by a designated crisis response coordinator, shall follow the postvention plan created by the Utah State Board of Education, "Healing Our Schools After a Loss" following a death by suicide. This plan may be applicable to all school community related suicides whether it be student (past or present), staff, or other prominent school community member. A meeting of the crisis team to implement the plan shall take place immediately following word of the suicide death, even if the death has not yet been confirmed to be a suicide.

### **Special Considerations**

If the parent does not follow through with the school's recommendation and the student's perceived risk persists, the school shall follow state/George Washington Academy legal or policy requirements to ensure

### **360 – Suicide Prevention Procedure (cont.)**

---

student safety. This may include a range of suggested options for next steps — call 911, call Child Protective Services, call mobile crisis services, etc.

When a parent is notified of perceived suicide risk or an attempt, it is essential that the school maintain student confidentiality related to personal information such as sexual orientation or gender identity, especially when the student has not already disclosed to the parent or guardian and does not want it shared. Information shared should be restricted to the perceived risk of suicide or facts of the attempt. Ethically and legally, mental health professionals are required to report risk to self and others. Disclosing a student’s sexual orientation or gender identity without their explicit consent can in some cases endanger the student and at a minimum will impair the rapport developed with the professional.

Through discussion with the student, the Director or school-employed mental health professional will assess whether there is further risk of harm due to parent or guardian notification. If the Director, designee, or mental health professional believes, in their professional capacity, that contacting the parent or guardian would endanger the health or well-being of the student, they may delay such contact as appropriate. Consultation with another mental health professional is recommended before taking such inaction. If contact is delayed, the reasons for the delay should be documented. Legally, the parent should not be contacted and Child Protection Services should be notified if abuse or neglect is suspected.



## **PROPOSAL FOR**

## **BOARD**

### **ACTION**

**Proposal Title:** Borrower's Counsel , Bond & Disclosures Counsel, Underwriter

**Submitted by:** Kevin Peterson

**Originating Committee:** Finance Committee

Please briefly describe: (1) the situation giving rise to the proposal, (2) the background behind the proposal, (3) your assessment of the situation/background, and (4) your recommendation to the Board.

**Situation:** To proceed with the proposed bond issuance, GWA must retain qualified bond counsel and an underwriting team. Counsel is necessary to ensure legal, regulatory, and tax compliance, while underwriting is required to structure, price, market, and place the bonds effectively. Timely engagement of both is critical to meet financing objectives and market timelines

#### **Background Information, including a list of reviewing committees:**

David Robertson of LRB Public Finance Advisors, in coordination with the Finance Committee, has issued an RFP to multiple qualified firms requesting proposals outlining fees and availability to support GWA's upcoming bond issuance.

**Assessment:** The previous bond issuance was reviewed for consistency.

**Recommendation:** A recommendation has been made to select Farnsworth & Johnson as Borrower's Counsel. Orrick has been selected to serve as Bond and Disclosure Counsel, and Piper has been selected as Underwriter for the proposed bond issuance.

Please submit this form with all accompanying paperwork to the Board Secretary, Shelbi Kelly, at [skelly@gwacademy.org](mailto:skelly@gwacademy.org) by the 15<sup>th</sup> day of the month of the Board meeting.



**From:** David Robertson <[david@lrbfinance.com](mailto:david@lrbfinance.com)>

**To:** Shannon Greer - George Washington Academy ([sgreer@gwacademy.org](mailto:sgreer@gwacademy.org))  
<[sgreer@gwacademy.org](mailto:sgreer@gwacademy.org)>; Kevin Peterson <[kpeterson@gwacademy.org](mailto:kpeterson@gwacademy.org)>

**Sent:** Thursday, January 8, 2026 at 06:18:16 PM MST

**Subject:** committee summary

Good day Shannon and Kevin, here is a summary from today's committee meeting. The committee reviewed the results of the proposals for borrower's counsel, bond & disclosure counsel and underwriter. The apparent recommendations are provided below. Happy to answer any questions at your convenience:

**Borrower's Counsel:** represents the School (as Borrower) on the legal side throughout the process, will help with documents, real estate and provide an opinion to bond counsel that the School is authorized to proceed

- Sent RFP to 4 firms
- Received 2 bids
  - Dorsey & Whitney
  - Farnsworth Johnson
- Farnsworth being a qualified and capable firm and low bidder appears is the Committee's Recommendation

**Bond & Disclosure Counsel:** as bond counsel, it represents the Issuer in drafting all bond documents and provides an opinion to bondholders that the documents are tax-exempt. As disclosure counsel, it drafts the offering documents utilized by the underwriter to market and sell the bonds to the investing public

- Sent RFP to 4 firms approved by the State Attorney General's Office to serve as bond counsel to the Utah Charter School Finance Authority as the issuer of the bonds.
- Received 4 bids
  - Chapman and Cutler
  - Dorsey & Whitney
  - Gilmore & Bell
  - Orrick
- Orrick being a qualified and capable firm and low bidder appears is the Committee's recommendation

**Underwriter:** sells the bonds to the investing public

- Sent RFP to 6 firms
- Received 6 bids
  - DA Davidson
  - Crews
  - HJ Sims
  - Piper
  - Raymond James
  - RW Baird
- Piper being a qualified and capable firm, providing a reliable and low proposed pricing and responsive fee appears is the Committee's recommendation

I can provide more insights and information if helpful.

Thank you.