

# Maria Montessori Academy Board of Directors Meeting

**Date:** March 27, 2025

**Time:** 4:00 PM

**Location:** 2505 N. 200 E. North Ogden, UT 84414



*The mission of Maria Montessori Academy is to provide an individualized grade K-9 education that promotes academic excellence founded on the authentic philosophy of Dr. Maria Montessori. MMA will craft each child's education in partnership with educators and parents to achieve higher levels of academic, personal and social achievement, thereby preparing students to become constructive contributors to their community.*

## AGENDA

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### CALL TO ORDER

### PUBLIC COMMENT

- 2025/2026 Fee Schedule

### CONSENT ITEMS

- 09.26.2024 Board Meeting Minutes

### REPORTS

- Director's Report
  - Gifted and Talented Grant 2024/2025 Report
- Finance Report

### VOTING & DISCUSSION ITEMS

- Teacher Salaries
- Kitchen Equipment Budget Estimate
- LEA Licenses
- Award Landscaping RFP
- Rescind Library Materials Policy
- Amend Travel Policy
- 2025/2026 School LAND Trust Plan
- 2025/2026 Fee Schedule
- Director Evaluation and Stakeholder Feedback
- Board Member Recruiting

### CALENDARING

- Next Board Meeting May 8, 2025 @ 5:00pm

### ADJOURN

In compliance with the Americans with Disabilities Act, persons needing auxiliary communicative aids and services for these meetings should call 801-444-9378. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

# Maria Montessori Academy

## Board of Directors Meeting

**Date:** January 9, 2025

**Location:** Join Zoom Meeting <https://us02web.zoom.us/j/9078319259>

**Board Members Present:** Wendy Eastman, Caroline Kellogg, Nancy Lindeman

**Excused Board Members:** Logan Kashanipour

**Others Present:** Kacee Weaver, Nicole Jones, Hannah Dorius, Jon McQueary



## MINUTES

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### CALL TO ORDER

Wendy Eastman called the board meeting to order at 5:06PM.

### AUDIT TRAINING AND PRESENTATION

Ken Jeppesen presented 4 opinions from the 2023-2024 audit and each of them presented clean. The audit was described as uneventful, which according to the auditors is a positive indicator. The first opinion in the audit shows an increase in capital assets. Lastly the third opinion highlighted shows that the PTIF account has accrued significant interest over the past year. This shows a responsible use of funds.

Ken Jeppesen left the meeting at 5:16PM.

### PUBLIC COMMENT

There was no public comment. This was the second opportunity for the public to comment on the Sex Education Curriculum and the first opportunity for the 2025-2026 Fee Schedule.

### CONSENT ITEMS

- September 26, 2024 Board Meeting Minutes  
*Caroline Kellogg made a motion to approve the September 26, 2024 Board Meeting Minutes; Nancy Lindeman seconded. The motion passed unanimously. Votes were as follows: Wendy Eastman, Aye; Caroline Kellogg, Aye; Nancy Lindeman, Aye.*

### REPORTS

- Director's Report  
Kacee Weaver presented the Director's Report to the board. Enrollment is at 402 students. Staffing and marketing updates were shared with the board. The school climate survey was reviewed and showcased very positive results. A kitchen manager has been hired, and equipment was donated to help get the school lunch program up and running.
- Finance Report  
Jon McQueary presented the Finance Report to the board. 42% of the fiscal year is over and can be used as a benchmark when looking at the income statement.

Funding streams fluctuated slightly mid-year which is normal. Revenue is looking good; federal revenues are still at zero, but this is common at this point in the year. The PTIF account is earning ample interest. Cash on hand is very healthy.

## **VOTING AND DISCUSSION ITEMS**

- Sex Education Curriculum  
Kacee Weaver presented the Sex Education Curriculum. The curriculum is state approved. The curriculum has not changed from previous years.
- School LAND Trust Election Procedures  
Kacee Weaver presented the School LAND Trust Election Procedures to the board. The stipulation of minimum members has changed from five to two. This matches the law and will give the school more flexibility.
- Policies
  - Bullying and Hazing Policy  
Nicole Jones presented a summary of the changes to this policy. The new policy defines what an incident of bullying means and now parents of both parties involved need to be notified. Administrators are responsible for verifying the incidents. An action plan must be developed if students are involved in bullying.
  - FERPA Policy  
Nicole Jones presented a summary of the changes to this policy. Parents now have full control over their student's records. This change will protect the privacy of students and their families. The Director will establish administrative procedures in conjunction with this policy.
  - Paid Professional Hours for Educators Policy  
Nicole Jones presented a summary of the changes to this policy. Teachers can be reimbursed for 32 hours of professional development. Other slight clarifications in the policy were made.
  - Time and Effort Policy  
Nicole Jones presented a summary of the changes to this policy. The State restricted funds require time and effort documentation. Some language corrected to meeting state and federal guidelines.
- 2024-2025 School Year Calendar Amendment  
Kacee Weaver presented the amendment needed for the 2024-2025 school year calendar. Kacee Weaver wants to move Parent Teacher Conferences so teachers can go to a Montessori conference. The conferences will be moved to the 10<sup>th</sup> and 11<sup>th</sup> of March.

- 2025-2026 School Year Calendar  
Kacee Weaver presented the 2025-2026 school year calendar. The calendar was built based on input from teachers and parents.
- 100Elk Outdoor Invoice  
Kacee Weaver presented the need to approve the 100Elk Outdoor for the 6<sup>th</sup> grade field trip. The invoice will be approved up to \$11,000 to cover the cost of lodging and other necessities for the students during their stay.
- Board Member Recruiting  
The board discussed recruiting another board member that will support the school, Montessori method, and the Director. An advertisement will be sent out in the newsletter and posting on the Maria Montessori Academy Website.

*Caroline Kellogg made a motion to approve the Sex Education Curriculum, School LAND Trust Election Procedures, Bullying and Hazing Policy, FERPA Policy Paid Professional Hours for Educators Policy, Time and Effort Policy, 2024-2025 School Year Calendar Amendment, 2025-2026 School Year Calendar, and 100Elk Outdoor purchase up to \$11,000; Nancy Lindeman seconded. The motion passed unanimously. Votes were as follows: Wendy Eastman, Aye; Caroline Kellogg, Aye; Nancy Lindeman, Aye.*

#### **CALENDARING**

- Next Board Meeting will be held March 20, 2025 @ 5:00PM.

#### **ADJOURN**

*At 6:25PM, Wendy Eastman made a motion to adjourn. Caroline Kellogg seconded the motion. The motion passed unanimously. Votes were as follows: Wendy Eastman, Aye; Caroline Kellogg, Aye; Nancy Lindeman, Aye.*

# Maria Montessori Academy

## Statement of Activities

Created on March 10, 2025

For Prior Month

	Annual June 30, 2025 Budget	Year-to-Date February 28, 2025 Actual	% of Budget
<b>Net Income</b>			
Income			
Revenue From Local Sources	120,841	128,349	106.2 %
Revenue From State Sources	4,605,816	3,136,758	68.1 %
Revenue From Federal Sources	114,087	0	(0.0) %
Total Income	4,840,744	3,265,107	67.5 %
Expenses			
Instruction/Salaries	2,338,264	1,345,299	57.5 %
Employee Benefits	547,321	282,273	51.6 %
Purchased Prof & Tech Serv	574,511	410,372	71.4 %
Purchased Property Services	172,979	93,022	53.8 %
Other Purchased Services	95,653	66,725	69.8 %
Supplies & Materials	290,671	162,946	56.1 %
Property	0	5,960	0.0 %
Debt Services & Miscellaneous	743,000	486,485	65.5 %
Total Expenses	4,762,399	2,853,082	59.9 %
<b>Total Net Income</b>	<b>78,345</b>	<b>412,025</b>	<b>525.9 %</b>

**Maria Montessori Academy**  
**Statement of Financial Position**  
**Created on March 10, 2025**  
**For Prior Month**

	Period Ending 02/28/2025 <small>Actual</small>	Period Ending 02/29/2024 <small>Actual</small>
<b>Assets &amp; Other Debits</b>		
Current Assets		
Operating Cash	2,745,220	2,451,252
Accounts Receivables	292	462
Total Current Assets	<u>2,745,512</u>	<u>2,451,714</u>
Net Assets		
Fixed Assets	12,515,657	12,290,762
Depreciation	(3,048,199)	(2,698,161)
Total Net Assets	<u>9,467,458</u>	<u>9,592,601</u>
<b>Total Assets &amp; Other Debits</b>	<b><u>12,212,970</u></b>	<b><u>12,044,315</u></b>
<b>Liabilities &amp; Fund Equity</b>		
Current Liabilities	56,211	96,028
Long-Term Liabilities	<u>10,024,298</u>	<u>10,314,609</u>
Fund Balance	<u>1,720,436</u>	<u>1,335,142</u>
Net Income	<u>412,025</u>	<u>298,536</u>
<b>Total Liabilities &amp; Fund Equity</b>	<b><u>12,212,970</u></b>	<b><u>12,044,315</u></b>

## Goal

6th and 9th grade students will increase EOY RISE/ASPIRE+ Science scores by 3%

## Academic Area

Science

## Measurements

Summative data from 6th grade RISE and 9th grade ASPIRE+ Science assessments will be used to inform and improve instruction in these courses.

## Action Steps

1. Teachers will collaborate to create a scope and sequence using the Utah Core/SEEd Standards.
2. Materials will be purchased to enhance and extend the concepts for 6th and 9th grade science. (\$5000)
3. Teachers will administer RISE Benchmarks and other formative assessments to ensure students are moving toward increased proficiency.
4. Re-teaching and retesting plans will be developed during PLCs, utilizing formative assessment data. Students who score below 80% proficiency will participate in reteaching groups.
5. Students will participate in field experiences to enhance their understanding and application of the science standards for each grade level. (\$25,000)

## Planned Expenditures

Category	Description	Estimated Cost
Materials	Step #2	\$5000
Overnight Field Experiences	Step #5	\$25,000

## Goal

Students will show growth in mathematics by the end of the school year as measured by Acadience math assessments. Scores from BOY will increase by 5% at EOY for Kindergarten through third grade.

## Academic Area

Mathematics

## Measurements

Acadience benchmarks and progress monitoring.

# Action Steps

- 1. Teachers will be trained using the Montessori method (\$20,000)
- 2. Teachers will collaborate to create a scope and sequence using the Utah Core Standards.
- 3. Teachers will administer Acadience progress monitoring and ensure students are moving toward increased proficiency.
- 4. Re-teaching and retesting plans will be developed during PLCs, utilizing formative assessment data. Students who score below 80% proficiency will participate in reteaching groups.
- 5. An additional staff assistant will be hired to facilitate mathematics instruction/intervention (\$12,000)

# Planned Expenditures

Category	Description	Estimated Cost
Salaries and Benefits	Step #5	\$12,000
Professional Development	Step #1	\$20,000



# MARIA

## MONTESSORI ACADEMY

### 2025-2026 Student Fee Schedule

The following student fees may be assessed to students of Maria Montessori Academy as follows:

<b>REQUIRED FEES</b> <b>(for all students in grades 6-9)</b>		
Fee Description:	Expenditures Funded By Fee (Spend Plan)	Total Fee
Elective Courses for 9th grade only (except PE)	Instructional supplies and instructional equipment	<b>\$15</b>

<b>FEES FOR OPTIONAL COURSES, CLUBS, ACTIVITIES, AND SPORTS</b> <b>(for participating students in grades identified below)</b>		
Fee Description	Expenditures Funded By Fee (Spend Plan)	Total Fee
Sports (grades 6-9)	Referees, uniforms, instructional equipment, camps, competition fees, supplies, and stipends for coaches	<b>Up to \$90 per sport</b>
End-of-Year Trip (grade 9)	Transportation, supplies, food, lodging, and activities	<b>Up to \$500</b>
End-of-Year Trip (grade 6)	Transportation, supplies, food, lodging, and activities	<b>Up to \$500</b>

<b>MISCELLANEOUS CHARGES</b> <b>(for participating students in grades identified below)</b>		
Fee Description	Expenditures Funded By Fee (Spend Plan)	Total Fee
Lock replacement	Replacement for a lost or broken lock	<b>\$5</b>
Elective Schedule Change (grades 6-9)	Administrative costs	<b>\$10 per change</b>

**Per Student (Grade 9) Annual Maximum Fee Amount For School Year: \$645** This amount reflects the total student fees any student in grade 9 would be required to pay if the student participated in all courses, programs, and activities provided, sponsored, or supported by the School for students in grade 9 for the year.

**Per Student (Grades 7-8) Annual Maximum Fee Amount For School Year: \$345** This amount reflects the total student fees any student in grades 7-8 would be required to pay if the student participated in all courses, programs, and activities provided, sponsored, or supported by the School for students in grades 7-8 for the year.

**Per Student (Grade 6) Annual Maximum Fee Amount For School Year: \$500** This amount reflects the total student fees any student in grade 6 would be required to pay if the student participated in all after-school courses, programs, and activities provided, sponsored, or supported by the School for students in grade 6 for the year.

### **Notice to Parents:**

Maria Montessori Academy allocates and applies all student fees it receives to the course, program, or activity for which the fee was paid. This fee schedule describes the types of expenditures the student fees help pay for with respect to the various courses, programs, or activities.

Your student may be eligible to have one or more of their fees waived. For information on fees and fee waivers, please contact an administrator at the School and/or review the school fees materials provided on the School's website. (School Fees Posters and Notices, Fee Waiver Policy, Fee Waiver Applications, Fee Waiver Decision and Appeal Form, etc.). If you file a fee waiver request with the School and the request is denied, you may appeal the School's decision.

**Maria Montessori Academy**  
**Policy: Fee Waiver Policy**  
**Approved: February 9, 2021**  
**Reapproved: March 8, 2022**

**Purpose**

Maria Montessori Academy (the "School") must abide by the Utah State Board of Education rules which direct the School's Board of Directors (the "Board") to implement a policy regarding student fees. The purpose of this policy is to provide educational opportunities for all students. This allows the School to establish a reasonable system of fees, while prohibiting practices that would exclude those unable to pay from participation in school-sponsored activities.

**Policy**

Under the direction of the Board, the School's principal (the "Principal") is authorized to administer this policy and is directed to do so fairly, objectively, and without delay, and in a manner that avoids stigma and unreasonable burdens on students or parents/guardians.

**Definitions**

"Co-curricular activity" means an activity, course, or program that:

- (a) is an extension of a curricular activity;
- (b) is included in an instructional plan and supervised or conducted by a teacher or educational professional;
- (c) is conducted outside of regular School hours;
- (d) is provided, sponsored, or supported by the School;
- (e) includes a required regular School day activity, course, or program.

"Curricular activity" means an activity, course, or program that is:

- (a) intended to deliver instruction;
- (b) provided, sponsored, or supported by the School; and
- (c) conducted only during School hours.

"Extracurricular activity"

(a) means an activity, a course, or a program that is:

- (i) not directly related to delivering instruction;
- (ii) not a curricular activity or co-curricular activity; and
- (iii) provided, sponsored, or supported by the School.

(b) does not include a non-curricular club as defined in Section 53G-7-701.

"Fee" means something of monetary value requested or required by the School as a condition to a student's participation in an activity, class, or program provided, sponsored, or supported by the School. This includes money or something of monetary value raised by a student or the student's family through fundraising.

"Instructional equipment"

- (a) means an activity-related, course-related, or program-related tool or instrument that: (i) is required for a student to use as part of an activity, course, or program in a secondary school;
- (ii) typically becomes the property of the student upon exiting the activity, course, or program, and
- (iii) is subject to a fee waiver;
- (b) includes:
  - (i) shears or styling tools;
  - (ii) a band instrument;
  - (iii) a camera;
  - (iv) a stethoscope; or
  - (v) sports equipment, including a bat, mitt, or tennis racquet.
- (c) does not include school equipment.

"Instructional supply" means a consumable or non-reusable supply that is necessary for a student to use as part of an activity, course, or program in a secondary school and includes:

- (a) prescriptive footwear;
- (b) brushes or other art supplies, including clay, paint, or art canvas;
- (c) wood for wood shop;
- (d) Legos for Lego robotics;
- (e) film; or
- (f) filament used for 3D printing.

"Non-waivable charge" means a cost, payment, or expenditure that: (a) is a personal discretionary charge or purchase, including:

- (i) a charge for insurance, unless the insurance is required for a student to participate in an activity, class, or program;
- (ii) a charge for college credit related to the successful completion of: (A) a concurrent enrollment class; or
- (B) an advanced placement examination; or
- (iii) except when requested or required by the School, a charge for a personal consumable item such as a yearbook, class ring, letterman jacket or sweater, or other similar item; (b) is subject to sales tax as described in Utah State Tax Commission Publication 35, Sales Tax Information for Public and Private Elementary and Secondary Schools; or

(c) by Utah Code, federal law, or State Board of Education rule is designated not to be a fee, including:

- (i) a school uniform as provided in Utah Code § 53G-7-801;
- (ii) a school lunch; or
- (iii) a charge for a replacement for damaged or lost School equipment or supplies.

"Provided, sponsored, or supported by the School"

(a) means an activity, class, program, fundraiser, club, camp, clinic, or other event that:

- (i) is authorized by the School; or
- (ii) satisfies at least one of the following conditions:
  - (A) the activity, class, program, fundraiser, club, camp, clinic, or other event is managed or supervised by the School, or a School employee in the employee's School employment capacity;
  - (B) the activity, class, program, fundraiser, club, camp, clinic, or other event uses, more than inconsequentially, the School's facilities, equipment, or other School resources; or

(C) the activity, class, program, fundraising event, club, camp, clinic, or other event is supported or subsidized, more than inconsequentially, by public funds, including the School's activity funds or minimum

school program dollars.

(b) does not include an activity, class, or program that meets the criteria of a non-curricular club as described in Title 53G, Chapter 7, Part 7, Student Clubs.

“Provision in lieu of fee waiver”

(a) means an alternative to fee payment or waiver of fee payment; and (b) does not include a plan under which fees are paid in installments or under some other delayed payment arrangement.

"Requested or required by the School as a condition to a student's participation" means something of monetary value that is impliedly or explicitly mandated or necessary for a student, parent, or family to provide so that a student may:

(a) fully participate in school or in a School activity, class, or program; (b) successfully complete a School class for the highest grade; or

(c) avoid a direct or indirect limitation on full participation in a School activity, class, or program, including limitations created by:

(i) peer pressure, shaming, stigmatizing, bullying, or the like; or

(ii) withholding or curtailing any privilege that is otherwise provided to any other student.

“School equipment” means a durable school-owned machine, equipment, or tool used by a student as part of an activity, course, or program in a secondary school and includes a saw or 3D printer. “School equipment” includes a saw or 3D printer.

"Something of monetary value"

(a) means a charge, expense, deposit, rental, fine, or payment, regardless of how the payment is termed, described, requested or required directly or indirectly, in the form of money, goods or services; and

(b) includes:

(i) charges or expenditures for a School field trip or activity trip, including related transportation, food, lodging, and admission charges;

(ii) payments made to a third party that provide a part of a School activity, class, or program;

(iii) classroom textbooks, supplies or materials;

(iv) charges or expenditures for school activity clothing; and

(v) a fine, except for a student fine specifically approved the School for: (A) failing to return School property;

(B) losing, wasting, or damaging private or School property through intentional, careless, or irresponsible behavior; or

(C) improper use of School property, including a parking violation.

“Textbook”

(a) means instructional material necessary for participation in an activity, course, or program, regardless of the format of the material;

(b) includes:

(i) a hardcopy book or printed pages of instructional material, including a consumable workbook; or

(ii) computer hardware, software, or digital content.

(c) does not include instructional equipment or instructional supplies.

“Waiver” means a full release from the requirement of payment of a fee and from any provision in lieu of fee payment.

### **General School Fees Provisions**

The School may only collect a fee for an activity, class, or program provided, sponsored, or supported by the School consistent with School policies and state law.

Beginning with the 2021-2022 school year:

- (a) if the School imposes a fee, the fee shall be equal to or less than the expense incurred by the School in providing for a student the activity, course, or program for which the School imposes a fee; and
- (b) the School may not impose an additional fee or increase a fee to supplant or subsidize another fee.

Beginning with the 2022-23 school year, the School may not sell textbooks or otherwise charge a fee for textbooks or the maintenance costs of School equipment as provided in Section 53G-7-602, except for a textbook used for a concurrent enrollment or advanced placement course.

All fees are subject to the fee waiver provisions of this policy.

### **Fees for Classes & Activities During the Regular School Day**

#### **Fees for Students in Kindergarten through Sixth Grade**

No fee may be charged in kindergarten through sixth grade for materials, textbooks, supplies (except as provided below), or for any class or regular school day activity, including assemblies and field trips.

Elementary students cannot be required to provide their own student supplies. However, the School or teacher may provide to a student’s parent or a suggested list of student supplies for use during the regular school day so that a parent or guardian may furnish on a voluntary basis student supplies for student use. The list provided to a student’s parent or guardian must include and be preceded by the following language:

"NOTICE: THE ITEMS ON THIS LIST WILL BE USED DURING THE REGULAR SCHOOL DAY. THEY MAY BE BROUGHT FROM HOME ON A VOLUNTARY BASIS, OTHERWISE, THEY WILL BE FURNISHED BY THE SCHOOL."

The School may charge a fee to a student in grade six if all of the following are true: (a) the School has students in any of the grades seven through twelve; (b) the School follows a secondary model of delivering instruction to the School’s grade six students; and (c) The School annually provides notice to parents that the School will collect fees from grade six students and that the fees are subject to waiver.

#### **Fees for Students in Seventh through Ninth Grade**

Fees may be charged in grades 7-9 in connection with an activity, class, or program provided, sponsored, or supported by the School that takes place during the regular school day if the fee is approved as provided in this policy and state law. All such fees are subject to waiver. In addition, if an established or approved class requires payment of fees or purchase of items (i.e., tickets to events, etc.) in order for students to fully participate and to have the opportunity to acquire all skills and knowledge required for full credit and highest grades, the fees or costs for the class are subject to waiver.

In project related courses, projects required for course completion will be included in the course fee.

Secondary students may be required to provide their own student supplies, subject to the fee waiver provisions of this policy.

#### **Fees for Optional Projects**

The School may require students at any grade level to provide materials or pay for an additional discretionary project if the student chooses a project in lieu of, or in addition to a required classroom project. A student may not be required to select an additional project as a condition to enrolling, completing, or receiving the highest possible grade for a course. The School will avoid allowing high cost additional projects, particularly when authorizing an additional discretionary project results in pressure on a student by teachers or peers to also complete a similar high cost project.

#### **Fees for Activities Outside of the Regular School Day**

Fees may be charged in all grades for any School-sponsored activity that does not take place during the regular school day if participation in the activity is voluntary and does not affect the student's grade or ability to participate fully in any course taught during the regular school day. Fee waivers are available for such fees.

A fee related to a co-curricular or extracurricular activity may not exceed the maximum fee amounts for the co-curricular or extracurricular activity adopted by the Board, as provided below.

Activities that use the School facilities outside the regular school day but are not provided, sponsored, or supported by the School (i.e., programs sponsored by the parent organization and/or an outside organization) may charge for participation, and fee waivers are not available for these charges.

An activity, class, or program that is provided, sponsored, or supported by the School outside of the regular School day or School year calendar is subject to this policy and state law regardless of the time or season of the activity, class, or program.

In the event the School provides supplemental kindergarten, the School may charge a fee related to a student's enrollment in the supplemental kindergarten. A fee for supplemental kindergarten is subject to waiver.

#### **Fee Schedule**

The Board will approve a Fee Schedule at least once each year on or before April 1. The Fee Schedule will establish the maximum fee amount per student for each activity and the maximum total aggregate fee amount per student per school year. No fee may be charged or assessed in connection with an activity, class, or program provided, sponsored, or supported by the School, including for a curricular, co-curricular or extracurricular activity, unless the fee has been set and approved by the Board, is equal

to or less than the established maximum fee amount for the activity, and is included in the approved Fee Schedule.

The School will encourage public participation in the development of the Fee Schedule and related policies.

Before approving the School's Fee Schedule, the School will provide an opportunity for the public to comment on the proposed Fee Schedule during a minimum of two public Board meetings. In addition to the standard notice of Board meetings under the Open and Public Meetings Act, the School will provide notice of these Board meetings using the same form of communication regularly used by the administration to communicate with parents. After the Fee Schedule is adopted, the Board may amend the Fee Schedule using the same process.

### **Maximum Fee Amounts**

In connection with establishing the Fee Schedule, the Board will establish a per student annual maximum fee amount that the School may charge a student for the student's participation in all courses, programs, and activities provided, sponsored, or supported by the School for the year. This is a maximum total aggregate fee amount per student per School year.

The Board may establish a reasonable number of activities, courses, or programs that will be covered by the annual maximum fee amount.

The amount of revenue raised by a student through an individual fundraiser for an activity, as well as the total per student amount expected to be received through required group fundraising for an activity, will be included as part of the maximum fee amount per student for the activity and maximum total aggregate fee amount per student.

### **Notice to Parents**

The Principal will annually provide written notice of the School's Fee Schedule and Fee Waiver Policy to the parent or guardian of each student in the School by ensuring that a written copy of the School's Fee Schedule and Fee Waiver Policy is included with all registration materials provided to potential or continuing students each year. The procedures for obtaining fee waivers and for appealing a denial of a waiver will also be included with the School's registration materials.

The School will post the applicable Fee Schedule and Fee Waiver Policy, including maximum fee amounts, on the School's website each school year.

### **Donations**



The School may not request or accept a donation in lieu of a fee from a student or parent unless the activity, class, or program for which the donation is solicited will otherwise be fully funded by the School and receipt of the donation will not affect participation by an individual student.

A donation is a fee if a student or parent is required to make the donation as a condition to the student's participation in an activity, class, or program.

The School may solicit and accept a donation or contribution in accordance with the School's policies, including the Donation and Fundraising Policy, but all such requests must clearly state that donations and contributions by a student or parent are voluntary.

If the School solicits donations, the School: (a) shall solicit and handle donations in accordance with policies and procedures established by the School; and (b) may not place any undue burden on a student or family in relation to a donation.

### **Fee Collection**

The School may pursue reasonable methods for obtaining payment for fees and for charges assessed in connection with a student losing or willfully damaging school property.

The School may not exclude students from school, an activity, a class, or a program that is provided, sponsored, or supported by the School during the regular school day; refuse to issue a course grade; or withhold official student records, including written or electronic grade reports, diplomas, or transcripts, as a result of unpaid fees.

The School may withhold the official student records of a student responsible for lost or damaged School property consistent with Utah Code § 53G-8-212 until the student or the student's parent has paid for the damages, but may not withhold a student's records required for student enrollment or placement in a subsequent school.

A reasonable charge may be imposed by the School to cover the cost of duplicating, mailing, or transmitting transcripts and other school records. No charge may be imposed for duplicating, mailing, or transmitting copies of school records to an elementary or secondary school in which the student is enrolled or intends to enroll.

Consistent with Utah Code § 53G-6-604, the School will forward a certified copy of a transferring student's record to a new school within 30 days of the request, regardless of whether the student owes fees or fines to the School.

Students shall be given notice and an opportunity to pay fines prior to withholding issuance of official written grade reports, diplomas and transcripts. If the student and the student's parent or guardian are unable to pay for damages or if it is determined by the School in consultation with the student's parents that the student's interests would not be served if the parents were to pay for the damages, then the School may provide for a program of voluntary work for the student in lieu of the payment. A general breakage fee levied against all students in a class or school is not permitted.

### **Budgeting and Spending Revenue Collected Through Fees**

The School will follow the general accounting standards described in Rule R277-113 for treatment of fee revenue.

Beginning with the 2020-2021 school year, the School will establish a spend plan for the revenue collected from each fee charged. The spend plan will (a) provide students, parents, and employees transparency by identifying a fee's funding uses; (b) identify the needs of the activity, course, or program for the fee being charged and include a list or description of the anticipated types of expenditures, for the current fiscal year or as carryover for use in a future fiscal year, funded by the fee charged.

### **School Fee Collections & Accounting Procedures**

It is the responsibility of the Principal to ensure that all student fees collected are in compliance with the Fee Schedule and applicable financial policies and procedures.

Fees must be received and deposited in a timely manner.

Money may only be collected by staff authorized by the Principal. Students may not collect fees.

Beginning in the 2020-21 school year, the School may not use revenue collected through fees to offset the cost of fee waivers by requiring students and families who do not qualify for fee waivers to pay an increased fee amount to cover the costs of students and families who qualify for fee waivers. However, the School may notify students and families that the students and families may voluntarily pay an increased fee amount or provide a donation to cover the costs of other students and families.

### **Fee Waiver Provisions**

To ensure that no student is denied the opportunity to participate in a class or activity that is provided, sponsored, or supported by the School because of an inability to pay a fee, the School provides fee waivers or other provisions in lieu of fee waivers. Fee waivers or other provisions in lieu of fee waivers will be available to any student whose parent is unable to pay a fee.

All fees are subject to waiver.

Non-waivable charges are not subject to waiver.

### **Fee Waiver Administration**

The Principal will administer this policy and will review and grant fee waiver requests. The process for obtaining waivers or pursuing alternatives will be administered in accordance with this policy, fairly, objectively, and without delay, and in a manner that avoids stigma, embarrassment, undue attention, and unreasonable burdens on students and parents.

The School will not treat a student receiving a fee waiver or provision in lieu of a fee waiver differently from other students. The process for obtaining waivers or pursuing alternatives will create no visible indicators that could lead to identification of fee waiver applicants.

The process for obtaining waivers or pursuing alternatives will comply with the privacy requirements of the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. 1232g (FERPA). The School may not identify a student on fee waiver to students, staff members, or other persons who do not need to know. As a general rule, teachers and coaches do not need to know which students receive fee waivers. Students may not assist in the fee waiver approval process.

### **Fee Waiver Eligibility**

A student is eligible for a fee waiver if the School receives verification that:

- (a) In accordance with Utah Code § 53G-7-504(4), family income falls within levels established annually by the State Superintendent and published on the Utah State Board of Education website;
- (b) The student to whom the fee applies receives Supplemental Security Income (SSI). If a student receives SSI, the School may require a benefit verification letter from the Social Security Administration;
- (c) The family receives TANF funding. If a student's family receives TANF, the School may require a letter of decision covering the period for which the fee waiver is sought from the Utah Department of Workforce Services; or (d) The student is in foster care through the Division of Child and Family Services or is in state custody. If a student is in state custody or foster care, the School may rely on the youth in care required intake form or school enrollment letter provided by a caseworker from the Utah Division of Child and Family Services or the Utah Juvenile Justice Department.

The School will not maintain copies of any documentation provided to verify eligibility for a fee waiver.

The School will not subject a family to unreasonable demands for re-qualification. The School may grant a fee waiver to a student, on a case-by-case basis, who does not qualify for a fee waiver under the foregoing provisions but who, because of extenuating circumstances, is not reasonably capable of paying the fee.

The School may charge a proportional share of a fee or a reduced fee if circumstances change for a student or family so that fee waiver eligibility no longer exists.

### **Fee Waiver Approval Process**

The Principal will inform patrons of the process for obtaining waivers and will provide a copy of the standard fee waiver application on the School's website and in registration materials each year.

The Principal will review fee waiver applications within five (5) school days of receipt. If the School denies a request for a fee waiver, the School will provide the decision to deny a waiver in writing and will provide notice of the procedure for appeal in the form approved by the Utah State Board of Education.

Any requirement that a student pay a fee will be suspended during any period in which the student's eligibility for a waiver is being determined or during the time a denial of waiver is

being appealed.

The School will maintain documentation of fee waiver applications and decisions that is adequate to report the required information to the Utah State Board of Education.

### **Appeal Process**

Denial of eligibility for a waiver may be appealed in writing to the Principal within ten (10) school days of receiving notice of denial. The School shall contact the parent within two (2) weeks after receiving the appeal and schedule a meeting with the Principal to discuss the parent's concerns. If, after meeting with the Principal, the waiver is still denied, the parent may appeal, in writing, within ten (10) school days of receiving notice of denial to the Board.

In order to protect privacy and confidentiality, the School will not retain information or documentation provided to verify eligibility for fee waivers.

### **Alternatives to Fees and Fee Waivers**

The School may allow a student to perform service or another approved task (as described in Utah Code § 53G-7-504(2)) in lieu of paying a fee or, in the case of an

eligible student, in lieu receiving a fee waiver, but such alternatives may not be required. If the School allows an alternative to satisfy a fee requirement, the Principal will explore with the interested student and his or her parent/guardian the alternatives available for satisfying the fee requirement, and parents will be given the opportunity to review proposed alternatives to fees and fee waivers. However, if a student is eligible for a waiver, textbook fees must be waived, and no alternative in lieu of a fee waiver is permissible for such fees.

The School may allow a student to perform service in lieu of paying a fee or receiving a fee waiver if: (a) the School establishes a service policy or procedure that ensure that a service assignment is appropriate to the age, physical condition, and maturity of the student; (b) the School's service policy or procedure is consistent with state and federal laws, including Section 53G-7-504 regarding the waiver of fees and the federal Fair Labor Standards Act, 29 U.S.C. 201; (c) the service can be performed within a reasonable period of time; and (d) the service is at least equal to the minimum wage for each hour or service.

A student who performs service may not be treated differently than other students who pay a fee.

The service may not create an unreasonable burden for a student or parent and may not be of such a nature as to demean or stigmatize the student.

The School will transfer the student's service credit to another LEA upon request of the student.

The School may make an installment payment plan available for the payment of a fee. Such a payment plan may not be required in lieu of a fee waiver.

### **Annual Review, Approval, and Training**

The Board will review and approve this policy annually.

The School will develop a plan for at least annual training of School employees on fee related policies specific to each employee's job functions.



**A Better Way To Travel**

**542 South Delong Street  
Salt Lake City, UT 84104**

Phone: 801-975-0202  
Fax: 801-975-0289  
Toll Free 800-366-0288  
Website: www.lebus.com  
Email: mail@lebus.com

## Charter Invoice

**Nekane Welch  
Maria Montessori Academy  
2505 North 200 East  
Ogden, UT 844414**

Invoice Date: **11/05/24**

Charter Order #: **175660**

Phone: **801-827-0150**

Fax:

Order Date: **10/29/24**

SalesRep: **Cheryl Bergener**

Group Name: **Maria Montessori Academy**

Group Leader: **Nekane Welch**

Destination: **Buena Vista, CO**

Leave Date: **Monday, April 21, 2025**

Spot Time: **6:45 am**

Leave Time: **7:00 am**

Pickup **Maria Montessori Academy**

Location: **2505 N 200 E  
North Ogden, UT 84414**

# Coaches: **1**

Equipment: **52 PAX**

Return Date: **Friday, April 25, 2025**

Retn\DropTime: **6:00 pm**

Destination **18325 Co Rd 366,**  
Details: **Buena Vista, CO 81211**

Description	# Coaches	Qty	Rate	Charge
Service 21APR - 25APR (5days) / 1300 miles	1	1300	\$4.85	\$6,305.00
Driver Gratuity - suggested at 10%	1	5	\$125.00	\$625.00
Fuel Surcharge may apply (quoted at \$5.00 gallon)	1	.02		\$0.00

<u>Due Dates</u>	<u>Description</u>	<u>Amount</u>	<u>Date Received</u>
03/31/25	10% Deposit	\$693.00	

**Transport Charge: \$6,930.00**

**Amount Paid: \$0.00**

**Balance Due: \$6,930.00**

### Payment Terms:

Due upon receipt or, if prior arrangements have been made, net 30 days. If, for whatever reason, a Balance remains unpaid, buyer agrees to pay a Finance Charge of 2% per month (24% annum) or the maximum amount allowed by law will be charged.

As of October 1, 2013: The price of your charter is quoted as a cash price. Our preferred method of payment is: company check, cash, electronic or wire transfer. There will be a 3% handling fee on any other form of payment.

Cost of collections: If chartering party fails to pay amount due, chartering party agrees to pay the full amount of any costs or expenses, including attorney's fee, collection fees and finance charges together with any costs incurred by Le bus in the collection of such overdue amounts, by litigation or otherwise.

# MARIA

## MONTESSORI ACADEMY

### 2025-2026 Student Fee Schedule

The following student fees may be assessed to students of Maria Montessori Academy as follows:

REQUIRED FEES (for all students in grades 6-9)		
Fee Description:	Expenditures Funded By Fee (Spend Plan)	Total Fee
Elective Courses for 9th grade only (except PE)	<sup>Instructional</sup> Classroom supplies and instructional equipment	\$15

FEES FOR OPTIONAL COURSES, CLUBS, ACTIVITIES, AND SPORTS (for participating students in grades identified below)		
Fee Description	Expenditures Funded By Fee (Spend Plan)	Total Fee
Sports (grades 6-9)	Referees, uniforms, instructional equipment, camps, competition fees, supplies, and stipends for coaches	Up to \$90 per sport
End-of-Year Trip (grade 9)	Transportation, supplies, food, lodging, and activities	Up to \$500
6th Grade Field Trip	Transportation, supplies, food, lodging, and activities	Up to \$500

MISCELLANEOUS FEES (for participating students in grades identified below)		
Fee Description	Expenditures Funded By Fee (Spend Plan)	Total Fee
Lock replacement	Replacement for a lost or broken lock	\$5
<sup>Elective course</sup> Class Schedule Change (grades 6-9)	Administrative costs	\$10 per change

This fee okay if 6th grade considered part of Jr. High

Not a fee; can still charge

can't charge this w/respect to ELA, Health Education, Math, Science, social studies



The mission of Maria Montessori Academy is to provide an individualized education that promotes academic excellence founded on the authentic philosophy of Dr. Maria Montessori. Maria Montessori Academy will craft each child's education in partnership with educators and parents to achieve higher levels of academic, personal and social achievement, thereby preparing students to become constructive contributors to their community.

# Director Report - March 2025

## SUMMARY

January, February, and March have been full of events! HOPE Week, girls basketball season, chili cook-off, History Fair, Spelling Bee, STEAM Night, student-led conferences and Science Fair are just some of the opportunities our students have had to demonstrate their learning and build community. Five of our ninth grade students will be moving on to the State Science Fair! Students have participated in field experiences at the National History Museum, Ogden Nature Center, Ogden Dinosaur Park, Hill Aerospace Museum, Utah Museum of Fine Arts and more. Additionally, we've had several professional groups in the building this month; First Educational Resources, Center for Guided Montessori Studies, and LeveragED have provided valuable support and feedback about improving systems, instruction, and climate. We're incorporating the feedback into the Continuous Improvement Plan and anticipating another visit from LeveragED in May for a School Health Assessment. Eleven staff members attended the American Montessori Society conference in Denver and shared their take-aways during a recent professional development day.

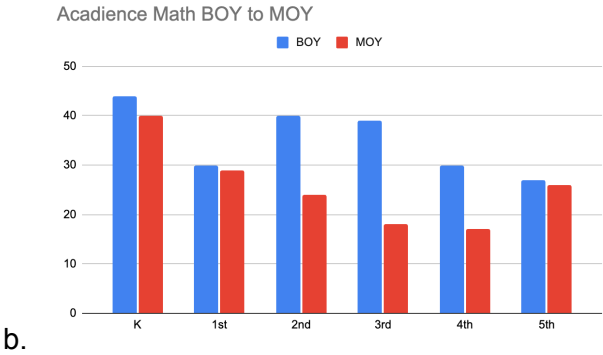
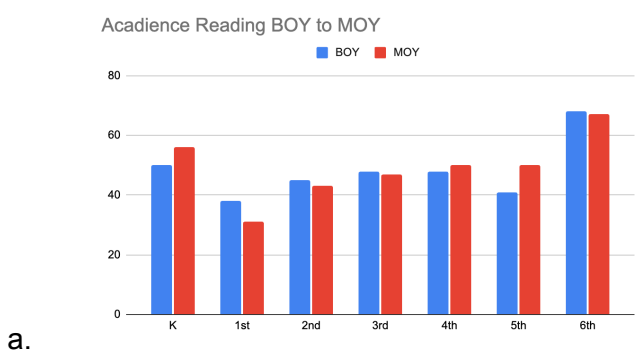
## SCHOOL GOALS

1. Enhance family engagement and support by developing comprehensive resources and workshops that equip parents with the knowledge and skills to actively participate in their children's educational journey and overall development.
  - a. March PTC attendance - 88% of elementary families attended. 27% of junior high families attended.
  - b. YTD daily attendance - 88%
2. Implement evidence-based strategies and proactive behavior interventions to foster a positive school culture and improve student behavior, ensuring a safe and conducive learning environment for all students.
  - a. LCSW was hired one-day a week with additional funding from the SBMHQ grant.
  - b. SSS, nurse, counselor attended DBT Strategies-A workshop and have begun implementing new learning in small groups.
  - c. Partnership with Stand For Kind
3. Implement sustainable practices and supportive initiatives that prioritize teacher well-being, reduce workload stressors, and foster a positive school culture, ultimately eliminating teacher burnout and enhancing job satisfaction.
  - a. PD opportunities provided for all who have requested. Include PE, nursing, RISE testing development, First Aid, Montessori training, and more.
4. Expand and enhance enrichment opportunities for advanced students by developing specialized



programs, providing tailored resources, and fostering mentorship opportunities, ensuring each student's intellectual curiosity and potential are maximized.

- a. Identified upper elementary students who have mastered the 5th grade content and they have begun attending 6th grade math classes.
  - b. All 5th graders will have an opportunity to shadow in the junior high program.
  - c. Several additional students added to Mountain Heights advanced learning courses.
5. Acadience Progress Monitoring and RISE benchmarking will be used to create reteaching and differentiation groups and students will become familiar with the assessment platforms and review their own progress.



# ENROLLMENT

2024-2025 As of 3/16/25 -

K	1	2	3	4	5	6	7	8	9	Total
51	59	52	32	39	44	30	30	28	24	389

# STAFFING

- Andrew Clawson (SpEd) and Katin Wells have moved on from MMA.
- Heather Thanadabouth has been hired as an elementary staff assistant
- Alexia Martinez was hired to replace Kaitin Wells.
- Interviews for 2025-2026 school year are underway! Priorities include:
  - Junior High Arts
  - Technology Specialist
  - Music teacher

# MARKETING

- Monthly Information Nights
- Tours for accepted families

# PROGRAMS UPDATE

- Academics
  - MOY Acadience reading proficiency noteables:
    - Kindergarten increased proficiency by 8%
    - 5th grade increased proficiency by 10%

- Small groups created during deep data dives for remediation and reteaching
- RISE Benchmarks being used in junior high.
- **Athletics** - Girls basketball season was a success! 10 athletes participated. Boys soccer is underway with 20 athletes participating and Track has kicked off with 25 athletes!
- **Choir/Elementary Music/Musical Theater** - Two days of spring performances are planned for the end of the month.
- **Family Teacher Association** - Imaginarium Art show was a success and brought in \$3000. FTA also did a fantastic job supplying staff with dinner during parent teacher conferences. We are grateful for the support of our parents.
- **NSLP** - Training underway expect acceptance to the National School Lunch Program in August. We expect to have lunch options available for the 25-26 school year.
- **Gifted and Talented** - Grant report update - Our students and families have greatly appreciated the enrichment opportunities for their students performing at high levels. It has allowed us to meet our mission of individualizing education. We would however, like to implement additional strategies within our classrooms and increase the number of students served by this program. Plans for next year include AVID strategies and PCBL implementation.

## FACILITIES UPDATE

- Getting quotes to improve the west side of the building with ground cover.
- Kitchen equipment [budget](#)
- Potential replacement of carpet in the elementary building.

## FUNDRAISING

- Boosterthon raised \$2300 for PE equipment
- Student Council raised \$1000 at Neptune's Skating Night
- FTA has raised \$17,000 this year.

## UPCOMING

- Spring Performances March 27-28, 2-3pm
- 6th grade trip to 100 Elk Lodge April 21-25
- 9th grade trip to Miami May 5-9



# 2025 Property Maintenance Proposal

**“YOUR COMPLETE PROPERTY MAINTENANCE SPECIALIST”**

Client:	Maria Montessori Academy	Contact:	Kirk Blake
Address:	2505 N 200 E. Ogden, UT	Contact Number:	801-444-9878
Billing Address:		Email	<a href="mailto:Kirk@academicawest.com">Kirk@academicawest.com</a>
Agreement Period	1 Year Agreement	3 Year Agreement	5 Year Agreement
Weekly Lawn Maintenance-mowing, trimming, edging, blowing & trash patrol	\$385 per week	\$375 per week	\$365 per week
Commercial turf fertilizer program (4-6 total applications) 1 pre-emergent/fertilizer, 4 fertilizer w/herbicide, & insecticide w/revive app	\$780 per application (Estimated 202,570 sq ft)	\$770 per application	\$760 per application
Irrigation System Start up	\$280.00	\$270.00	\$260.00
Irrigation Repairs & adjustments	\$85 per man / hr + parts	\$85 per man / hr + parts	\$85 per man / hr + parts
Irrigation Winterization/Blow out	\$425.00	\$415.00	\$405.00
Spring/Fall cleanup & haul off debris	\$75 per man/hr	\$75 per man/hr	\$75 per man/hr
Aeration	\$625.00	\$600.00	\$675.00
Shrub/Tree pruning/cut back fence lines	\$65 per man/hr	\$65 per man/hr	\$65 per man/hr
Snow Removal of Parking Lot per push (High priority, zero tolerance program)	\$400 per push Before school and afternoon pickup	\$390 per push	\$380 per push
Parking Lot Salt application	\$400	\$390	\$370
Snow Removal on all sidewalks	\$250	\$240	\$230
Ice Melt application to sidewalks per bag	\$30 per bag	\$30 per bag	\$30 per bag
Playground Mulch Delivered & Installed	\$90 per yard	\$90 per yard	\$90 per yard
Herbicide & Pre-emergent Application in Parking Lot/Sidewalks/Fencelines & flower beds	\$675 per application (3 apps recommended)	\$660 per application	\$650 per application

I Acknowledge the prices for the referenced property and agree to the terms and specifications. This contract may become void, by either party, with a written notice 30 days prior to termination for any legitimate reasoning. Upon termination of contract, balance for all completed services will be due. In the case of early termination of multi-year contract, client will be responsible to pay the 1 year pricing for all services rendered up to the cancellation date. An itemized monthly statement will be mailed by the end of that month for all services that are due.

Owner/Property Manager X\_\_\_\_\_ Date \_\_\_\_\_

Owner/Account Manager X\_\_\_\_\_ Date \_\_\_\_\_



Dear Superintendent,

The Maria Montessori Academy Governing Board approved LEA-Specific educator license(s) to 1 individual(s) in a public meeting held on 3/20/2025. The license areas, and endorsements shall be valid for one (1), two (2), or three (3) academic years as indicated on the attached spreadsheet which contains the associated educator information and rationale for the request. All LEA-Specific licenses will expire on June 30<sup>th</sup> of the final academic year approved.

Maria Montessori Academy Governing Board following assurances:

- The LEA has adopted a policy, in accordance with R277-301-7, to prepare and support educators with an LEA-Specific license. This policy is posted online at <https://www.mariamontessoriacademy.org/policies-procedures> click on “LEA-Specific Educator License Policy”.
- The educator has completed a criminal background check in accordance with Rule R277-214 and continued monitoring in accordance with Subsection 53G-11-403(1).
- The LEA will provide requisite training (educator ethics, classroom management/instruction, special education law/instruction, & Utah Effective Teaching Standards) within the 1<sup>st</sup> year of employment.
- The educators will complete the USBE Ethics Review within one (1) calendar year prior to being issued the license.
- The LEA will post all educator data, including assignments, in CACTUS no later than sixty (60) days following the date of the public governing board meeting approving the license area(s) and/or endorsement(s).
- Each LEA school employing an individual with an LEA-Specific license will prominently post the following on the school’s website:
  - Disclosure that the school employs individuals holding an LEA-Specific educator license, license areas, and/or endorsements.
  - An explanation of the types of educator licenses issued by USBE (Professional, Associate, LEA-Specific):  
“The following **designations or levels** apply to educator licenses, license areas (i.e.-elementary, secondary, special education), and content endorsements (i.e.-mathematics, music, Spanish, social studies):
    - Professional:** The educator has completed an educator preparation program that includes content and pedagogical knowledge. This program may have been completed at a university or in an alternate pathway that was supported by school districts/charters and the Utah State Board of Education.
    - Associate:** The educator is currently completing an educator preparation program, but has not yet completed all requirements for a Professional Educator License, license area, or endorsement. The educator is enrolled in a university-based or Local Education Agency (LEA)-based program. When the educator completes the program, they will have a professional level.
    - LEA-Specific:** The educator has not completed an educator preparation and is not currently enrolled in one.”
  - Percentage (based on FTE) of types of licenses, license areas, and endorsements held by educators employed in the school.
  - A link to the Utah Educator [Look-up Tool](#).

The Maria Montessori Academy Governing Board additionally acknowledges that LEA-Specific educator licenses, license areas, or endorsements may be renewed by the Utah State Board of Education (USBE). These renewals will be approved or denied on a case-by-case basis.

Sincerely,

**[SIGNATURE]**

LEA Governing Body Chairperson

## SY24-25 LEA-S(pecific) Requests

Effective 8/2021, the follow

						Years
						Approved
LEA (District or Charter) Name	Date LEA's Board Met	CACTUS ID	Last Name	First Name	(1, 2, 3)	
<i>Granite SD</i>	<i>1/5/2021</i>	<i>999999</i>	<i>Example</i>	<i>Educator</i>	<i>3</i>	
Maria Montessori Academy	3/20/2025	792443	Martinez	Alexia	3	

ning are NOT allowed for LEA-S: Audiologist, Deaf Education, Preschool Special E

Is this a RENEWAL Request from SY23- 24? (Y/N)				
	License	Endorsement		
	Area 1	Endorsement 1	Endorsement 2	3
<i>N</i>	<i>Secondary</i>	<i>Math Level 3</i>	<i>Chemistry</i>	
N		Language Arts	Social Studies Composite	

id., School Psychologist, School Social Worker, Special Ed (K-12), Speech Language Pathologist, Speech Language

Rational/Motions	Has LEA Specific			
	Is Educator's Assignment in CACTUS? (Y/N)	tab in CACTUS been completed? (Y/N)	Does Educator Have a current BACKGROUND check? (Y/N)	Does Educator Have a current ETHICS check? (Y/N)
<b><i>Educator is enrolling in EPP Fall 2021</i></b>	<b><i>Y</i></b>	<b><i>Y</i></b>	<b><i>Y</i></b>	<b><i>Y</i></b>
Educator is enrolling in APPEL Fall 2025	Y	N	Y	Y

uage Therapist

Has educator completed the pedagogical modules in Canvas? (Y/N)	LEA-Specific Application Received? (Y/N)
<div>Y</div> N/A	<div>Y</div> N



**Maria Montessori Academy**  
**Policy: Travel Policy**  
**Approved:**



**Purpose**

The purpose of this policy is to establish procedures for the authorization of, and payment for, travel by employees or Board members of Maria Montessori Academy (the “School”) who are required to travel to fulfill their official duties or to attend conventions, conferences, seminars, or other professional or educational events or meetings benefiting the School (“School-related business”).

**Policy**

1. This policy applies to all approved travel by employees and Board members on School-related business. For purposes of this policy, School-related business does not include an employee’s regular daily travel to and from work or a Board member’s travel to and from a regular Board meeting.
2. Travel for School-related business by employees must be approved in advance by the Director in order for the School to pay for the travel expenses as set forth in this policy. Travel for School-related business by the Director or a Board member must be communicated to the Board in advance of the travel, where possible. Payment for all travel-related expenses is subject to, and must be approved in accordance with, the School’s Purchasing and Disbursement Policy.
3. Employees must submit their travel requests to the Director, and the Director and Board members must communicate their travel requests to the Board, at least three (3) weeks prior to departure date and prior to making or paying for any travel arrangements, where possible. Such travel requests submitted to the Director and communications to the Board must explain the purpose of the travel and, where applicable, include the nature of the School-related business, proposed lodging accommodations, and approximate airfare or mileage, as applicable.
4. Per diem for meals and incidental expenses shall be paid for all approved travel events that are more than 100 miles from the School. The School shall pay per diem for meals and incidental expenses in accordance with the federal per diem meals and incidental expenses rates established by the U.S. General Services Administration (“GSA”). Where possible, the per diem shall be paid to the traveler by check no fewer than 48 hours prior to departure date.
5. Reasonable and necessary flight reservations for approved travel events shall:
  - a. Be personally made and paid for by the traveler and then reimbursed by the School based on receipts submitted by the traveler for such expenses. The traveler must provide receipts for all flight reservations for which reimbursement is sought; or

- b. Be made and paid for by the School.

Absent extraordinary circumstances, first class flight reservations are not considered reasonable and necessary under this policy.

6. Reasonable and necessary ground transfer expenses (e.g., taxi, public transportation, ride share, parking, etc.) for approved travel events shall be personally paid for by the traveler and then reimbursed by the School based on receipts submitted by the traveler for such expenses. The traveler must provide receipts for all ground transfer expenses for which reimbursement is sought.
7. Reasonable and necessary mileage incurred by the traveler for approved travel events shall be reimbursed by the School at the standard IRS mileage reimbursement rates in effect at the time.
8. Reasonable and necessary lodging accommodations for approved travel events shall be made and paid for by the School in accordance with the daily lodging rates established by the GSA. However, under extenuating circumstances and only after receiving approval from the Director or the Board, travelers may personally make and pay for reasonable and necessary lodging accommodations for approved travel events. A traveler in this situation shall be reimbursed by the School based on receipts submitted by the traveler for such expenses. Such reimbursements by the School shall not exceed the lodging rates established by the GSA plus any associated required taxes and fees for the lodging.
9. Lodging accommodations shall be approved for the number of days an approved travel event is in session, less one. However, this is subject to the following exceptions:
  - a. One additional night of lodging accommodations shall be approved when an additional travel day is required prior to an approved travel event;
  - b. A second additional night of lodging accommodations shall be approved when an additional travel day is required after the approved travel event concludes; and
  - c. Other additional nights of lodging accommodations shall be allowed only when approved in advance of the approved travel event by the Director or the Board President, as applicable.
10. School employees who have been issued a School credit card may use their School credit card to pay for approved flight reservations, ground transfer expenses, and lodging accommodations in accordance with this policy only after receiving approval from the Director. Such School employees may also use their School credit card to pay for other reasonable travel-related expenses only after receiving approval from the Director. The Director may also use his/her School credit card to pay for the same travel expenses listed above in this paragraph in accordance with the School's Credit Card Policy and Purchasing and Disbursement Policy. However, School credit cards shall not be used for per diem for meals and incidental expenses, as per diem

will be paid to travelers by check in advance of approved travel as explained earlier in this policy.

11. School employees and Board members shall submit an expense report related to an approved travel event to the Director within sixty (60) days from the end of the trip.
12. The School shall not fund travel expenses that are unrelated to the approved travel purpose. Similarly, the School shall not reimburse travelers for travel expenses that are unrelated to the approved travel purpose or which are determined by the School to be excessive.
13. Either the Director or the Board may authorize individual exceptions to this policy if they, in their sole discretion, feel an exception is appropriate under the circumstances.