



# Wallace Stegner Academy

## Board of Directors Meeting

**Date:** December 17, 2025

**Time:** 5:30 PM

**Teleconference:** <https://us02web.zoom.us/j/81831761216>

This meeting of the board of directors will be held electronically. If you would like to attend the meeting, accommodations will be made for the public at the anchor location identified.

*Wallace Stegner Academy will foster a community of active learners through academic rigor and citizenship by providing an opportunity for students to achieve academic excellence.*

## AGENDA

### CALL TO ORDER

### CONSENT ITEMS

- November 3, 2025, Board Meeting & Closed Session Minutes

### PUBLIC COMMENT (Comments will be limited to three minutes)

- Sex Education Curriculum

### REPORTS

- Finance Report
  - PTIF Transfer
- Directors' Report
  - CSP Update

### VOTING ITEMS

- Sex Education Curriculum for Kearns High School
- Award RFP for Landscaping and Snow Removal (Sunset)
- Schola Marketing Contract (Sunset)
- Reading Reconsidered Invoice
- Amended Bullying and Hazing Policy
- Amended Paid Parental and Postpartum Recovery Leave Policy
- Amended Selection and Purchase of Instructional Materials Policy
- Amended Cash Handling Policy
- Amended Credit Card Policy
- New Hotline Complaint Policy
- Update references to "Director" or "Director(s)" to "Chief Executive Officer" or "Chief Executive Officer(s)" throughout all board Policies

### CALENDARING

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

- Next Board Meeting is January 7, 2026 @ 5:30 PM.

## **ADJOURN**

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.



# Wallace Stegner Academy

## Board of Directors Meeting

**Date:** November 3, 2025

**In Attendance:** Sarah Vaughan, Jeremy Schow, Tony Furano, Frank Magana, Reed Farnsworth

**Others in Attendance:** Hannah Jones, Anthony Sudweeks

**Teleconference:** <https://us02web.zoom.us/j/88656335755>

### MINUTES

*Wallace Stegner Academy will foster a community of active learners through academic rigor and citizenship by providing an opportunity for students to achieve academic excellence.*

**CALL TO ORDER** Sarah Vaughan called the meeting to order at 5:02 PM.

#### CONSENT ITEMS

- October 6, 2025, Board Meeting & Closed Session Minutes  
Sarah Vaughan made a motion to approve the October 6, 2025, Board Meeting and Closed Session Minutes. Jeremy Schow seconded. The motion passed unanimously. The votes were as follows: Sarah Vaughan, Aye; Frank Magana, Aye; Tony Furano, Aye; Jeremy Schow, Aye.

#### VOTING & DISCUSSION ITEMS

- 2025-2026 School Land Trust Plan (Sunset Campus)

The board discussed the 2025-2026 School Land Trust Plan for the Sunset campus.

Tony Furano made a motion to approve the 2025-2026 School Land Trust Plan. Frank Magana seconded. The motion passed unanimously. The votes were as follows: Sarah Vaughan, Aye; Frank Magana, Aye; Tony Furano, Aye; Reed Farnsworth, Aye; Jeremy Schow, Aye.

**CLOSED SESSION** - to discuss the character, professional competence, or physical or mental health of an individual pursuant to Utah Code 52-4-205(1)(a).

Anthony Sudweeks left the meeting at 5:06 PM.

Reed Farnsworth joined the meeting at 5:09 PM.

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

At 5:07 PM Sarah Vaughan made a motion to move into a closed session to discuss the character, professional competence, or physical or mental health of an individual pursuant to Utah Code 52-4-205(1)(a). Jeremy Schow seconded. The motion passed unanimously. The votes were as follows: Sarah Vaughan, Aye; Frank Magana, Aye; Tony Furano, Aye; Jeremy Schow, Aye.

## **ADJOURN**

At 6:05 PM Sarah Vaughan made a motion to leave the closed session and adjourn the meeting. Jeremy Schow seconded. The motion passed unanimously. The votes were as follows: Sarah Vaughan, Aye; Frank Magana, Aye; Tony Furano, Aye; Reed Farnsworth, Aye; Jeremy Schow, Aye.

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.

# Wallace Stegner Academy Board of Directors Closed Session Statement

**Date:** 11.3.2025

**Location:** <https://us02web.zoom.us/j/88656335755>



## CLOSED SESSION SWORN STATEMENT:

At a duly noticed public meeting held on the date listed above, the board of directors for Wallace Stegner Academy entered a closed session for the sole purpose of discussing the character, professional competence, or physical or mental health of an individual in accordance with Utah Code Ann. 52-4-205(1)(a).

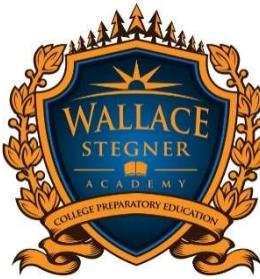
I declare under criminal penalty under the law of Utah that the foregoing is true and correct.

Signed on the 3rd day of November 2025.

A handwritten signature in black ink that reads "Sarah Vaughan".

Sarah Vaughan, Board President

In compliance with the Americans with Disabilities Act, persons needing accommodations for this meeting should call 801-444-9378 to make appropriate arrangements. One or more board members may participate electronically or telephonically pursuant to UCA 52-4-207.



## WSA – Board of Directors Meeting Wednesday, December 17, 2025

### *Financial Updates*

#### **Items of Note:**

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##### **Revenues**

- We are 41.6% of the way through the fiscal year, and overall revenues are at 50.0%.
- **Local revenues** are well ahead of schedule, driven primarily by the \$1,650,000 received from the Charter Growth Fund.
- **State revenues** are significantly ahead of budget. The state completed its October 1 enrollment true-up—initial funding was based on 2,200 students, while the budget assumed 2,600. Final October 1 enrollment came in at **2,848**, resulting in increased state funding.
- The state trued up funding based on Oct. 1. Initial funding was based on **2,200 students**, while the budget is based on **2,600 students, final Oct. 1 came in at 2,848**.
- **Federal revenues** are now ahead of schedule due to the reimbursement of **\$944,987** in Charter School Program (CSP) funds.

##### **Expenses**

- Overall expenses are at **35.0%**.
- **Salaries and benefits** continue to lag due to standard timing of employee contracts.
- **Purchased Professional & Technical Services** are slightly ahead at **42.3%**, driven by technology upgrades and E-Rate-related costs.
- **Property-related expenses** are ahead of schedule due to CSP-funded purchases for Sunset, including a school bus, kitchen equipment, classroom furniture, Chromebooks, security systems, audio enhancements, and projectors.
- **Debt service** payments occur in December and June, so this category will increase next month.

##### **Cash Position**

- Cash is up **\$1.2M** compared to the same time last year.
- PTIF ending balance: **\$4.4M**; Zions: **~\$1.7M**.

On December 5, **\$2.65M** was transferred from Zions to the PTIF.

##### **Balance Sheet**

- **Fixed assets** have increased due to the WVSD Lease Phase I, which became effective last year, along with the associated accumulated amortization.
- **Current liabilities** are down compared to last year, when there was a payable for supplemental enrollment that has since been repaid.
- **Long-term liabilities** have increased due to the associated lease liability..
- Net income is **\$5.2M**, which is **\$1.2M higher** than the same point last year.

**Wallace Stegner Academy**  
**Statement of Activities**

Created on December 10, 2025  
 For Prior Month

	Annual	Year-to-Date	
	June 30, 2026	November 30, 2025	% of Budget
	Budget	Actual	
<b>Net Income</b>			
Income			
Revenue From Local Sources	2,289,000	2,021,752	88.3 %
Revenue From State Sources	27,644,643	13,806,417	49.9 %
Revenue From Federal Sources	2,651,852	1,465,579	55.3 %
Revenue from Other Sources	2,000,000	0	0.0 %
<b>Total Income</b>	<b>34,585,495</b>	<b>17,293,748</b>	<b>50.0 %</b>
Expenses			
Instruction/Salaries	16,675,914	5,357,856	32.1 %
Employee Benefits	2,352,802	753,057	32.0 %
Purchased Prof & Tech Serv	1,612,648	682,486	42.3 %
Purchased Property Services	5,175,970	2,006,136	38.8 %
Other Purchased Services	2,820,647	1,015,833	36.0 %
Supplies & Materials	2,320,352	877,925	37.8 %
Property	1,265,808	1,279,659	101.1 %
Debt Services & Miscellaneous	2,349,318	65,412	2.8 %
<b>Total Expenses</b>	<b>34,573,459</b>	<b>12,038,364</b>	<b>34.8 %</b>
<b>Total Net Income</b>	<b>12,036</b>	<b>5,255,384</b>	<b>43,665.0 %</b>

**Wallace Stegner Academy**  
**Statement of Financial Position**  
**Created on December 10, 2025**  
**For Prior Month**

	Period Ending 11/30/2025	Period Ending 11/30/2024
	Actual	Actual
<b>Assets &amp; Other Debits</b>		
Current Assets		
Operating Cash	6,092,121	4,856,947
Accounts Receivables	14,630	13,529
Total Current Assets	<u>6,106,751</u>	<u>4,870,476</u>
Restricted Cash	8,165,863	7,706,997
Net Assets		
Fixed Assets	60,224,126	30,957,650
Depreciation	(4,414,895)	(2,095,088)
Total Net Assets	<u>55,809,231</u>	<u>28,862,562</u>
<b>Total Assets &amp; Other Debits</b>	<b><u>70,081,845</u></b>	<b><u>41,440,035</u></b>
<b>Liabilities &amp; Fund Equity</b>		
Current Liabilities		
	236,316	1,297,905
Long-Term Liabilities	<u>57,724,789</u>	<u>31,284,271</u>
Fund Balance	6,798,033	4,850,339
Net Income	5,322,707	4,007,520
<b>Total Liabilities &amp; Fund Equity</b>	<b><u>70,081,845</u></b>	<b><u>41,440,035</u></b>

WSA Kearns High Sex Education Curriculum:

[https://drive.google.com/drive/folders/19Lvn2KDMAAdDYcAFho0qxvmjZ6yZmPDM?usp=drive\\_link](https://drive.google.com/drive/folders/19Lvn2KDMAAdDYcAFho0qxvmjZ6yZmPDM?usp=drive_link)

**Wallace Stegner Academy  
Evaluation Committee Statement  
RFP for Landscaping and Snow Removal Services (Sunset Campus)**

**Background**

Wallace Stegner Academy issued an RFP for Landscaping and Snow Removal Services (Sunset Campus) on September 11, 2025. The School posted the RFP on its website and sent the RFP to multiple vendors. The deadline to submit a proposal in response to the RFP was September 23, 2025. Three companies submitted proposals to the School – Landscape Solutions, Extreme Green, and Rubicon.

**Evaluation and Scoring of Proposals**

The Evaluation Committee for this RFP was Adam Gerlach and Robb Jolley. They reviewed and scored all proposals on October 31, 2025.

There were three categories under which each proposal was evaluated and scored: Offeror's Experience and Qualifications (40 points possible); Past Performance for the School and/or References (20 points possible); and Cost (40 points possible).

The Evaluation Committee awarded Extreme Green's proposal the highest overall score, 38/100, Landscape Solutions' proposal scored 34/100, and Rubicon's proposal scored 20/100.

Based on the Evaluation Committee's review of the proposals, Extreme Green (a) is highly qualified and has extensive experience in providing these services; and (b) can provide such services at a competitive cost.

**Award Recommendation**

The Evaluation Committee believes that Extreme Green's proposal provides the best value to the School in connection with these services. The Evaluation Committee therefore recommends to the School's Board of Directors that it award the School's landscaping and snow removal contract for the Sunset campus to Extreme Green, with the contract having a term of up to five years, and authorize the CEO to negotiate and execute an agreement.

## Wallace Stegner Academy – Sunset Campus

### SPOT & Relationship Management (RM) Support Proposal

**Presented To:** Adam Gerlach & Anthony Sudweeks, Wallace Stegner Academies

**Proposal Date:** 11/6/2025

**Valid Until:** 11/12/2025

**Service Start Date:** 11/13/2025

**Dedicated Client Partner:** Claire Chayet, (602) 403-1901

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## Executive Summary

Wallace Stegner Academy's Sunset campus has a compelling academic model and mission, yet enrollment and family engagement challenges have begun to limit its potential. While the school has benefited from Schola's professional development through the Utah Association of Public Charter Schools agreement, the next step requires more direct, data-informed engagement with families.

This proposal outlines a targeted SPOT (School Placement & Outreach Team) and Relationship Management (RM) strategy focused exclusively on the Sunset campus. The goal is to strengthen every stage of the family enrollment journey, from initial inquiry through enrollment, retention, and re-engagement, while generating actionable insights on why prospective families decline or withdraw and how current families perceive their experience.

By combining Schola's full-cycle, multi-channel outreach model (calls, texts, and emails) with data-driven enrollment infrastructure, this engagement will allow WSA to not only fill more seats but also create a stronger, more connected community of families who believe in and advocate for the school.

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## Goals & Focus Areas

### 1. Nurture and Conversion of Interested Families

Many families enter the interest or application pipeline but never reach enrollment. Schola's SPOT team will take ownership of nurturing every interested family, ensuring that no lead is left behind.

#### Focus:

- Direct bilingual call and text outreach to all interest and application-stage families.
- Personalized follow-up cadence mapped to WSA's enrollment milestones (interest → tour → application → acceptance → enrollment → walk to class).
- Family-centered communication scripts emphasizing WSA's unique strengths, culture, and student outcomes.
- Real-time performance monitoring through Schola's CRM dashboards.

#### Outcome:

Higher conversion rates from initial inquiry to active enrollment, and a measurable lift in family engagement quality and response rates.

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### 2. Decline & Withdrawal Analysis + Winback Campaign

WSA's decline and withdrawal lists represent both lost opportunities and valuable insight. Schola will dig deep to understand the "why" behind these lost enrollments and re-engage families where possible.

#### Focus:

- Direct SPOT outreach to all declined/withdrawn families to identify common themes (e.g., location, communication gaps, scheduling, academic offerings, culture).
- Aggregation of data into actionable categories with supporting family quotes and context.

- Development of “Winback” call and messaging campaigns to re-engage families who remain open to reconsidering WSA.
- Recommendations to the WSA leadership team on improvements to messaging, operations, or offerings based on feedback patterns.

**Outcome:**

Clear understanding of why families opt out, leading to data-backed adjustments in recruitment and retention strategy — plus potential reactivation of previously lost families.

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### **3. Current Family Engagement & Sentiment Campaigns**

Retention is the ultimate test of family satisfaction. Schola will help WSA Sunset establish a strong feedback and relationship loop with currently enrolled families.

**Focus:**

- Quarterly family sentiment and feedback campaigns led by the SPOT team (calls, email/text surveys + follow-up).
- Testimonial and story collection from satisfied families to support future advocacy and recruitment.
- Targeted re-engagement for at-risk families showing signs of dissatisfaction or withdrawal consideration.
- Compilation of insights into actionable reports to inform school leadership on improvements across academics, communication, and culture.

**Outcome:**

Improved family satisfaction and retention, stronger sense of belonging, and valuable testimonials that reinforce WSA’s community narrative.

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## Scope of Work

Phase	Description	Deliverables
<b>Phase 1: Setup &amp; Alignment</b>	Define Sunset campus audience segments, access lists, and confirm outreach priorities. Configure CRM workflow and SPOT tracking dashboard.	<ul style="list-style-type: none"><li>- Data import &amp; tagging</li><li>- Campaign and cadence map</li><li>- Customized scripts and FAQs</li></ul>
<b>Phase 2: Family Nurture Campaigns</b>	Launch full outreach to all interested and applied families to drive movement through the pipeline.	<ul style="list-style-type: none"><li>- Ongoing bilingual call/text/email engagement</li><li>- Real-time performance monitoring</li><li>- Enrollment funnel visibility</li></ul>
<b>Phase 3: Decline &amp; Withdraw Analysis</b>	Conduct outreach to all families who declined or withdrew. Analyze feedback and identify patterns.	<ul style="list-style-type: none"><li>- Comprehensive loss-reason report</li><li>- Recommendations report</li><li>- Winback outreach plan</li></ul>
<b>Phase 4: Family Sentiment Campaigns</b>	Engage current families with quarterly outreach focused on retention, satisfaction, and storytelling.	<ul style="list-style-type: none"><li>- Family sentiment insights</li><li>- Story/testimonial repository</li><li>- Action recommendations</li></ul>
<b>Phase 5: Reporting &amp; Continuous Improvement</b>	Monitor and refine outreach campaigns to maximize conversions and insights.	<ul style="list-style-type: none"><li>- Performance Dashboard Access</li><li>- End-of-term summary and recommendations</li></ul>

## Deliverables

- Dedicated **SPOT bilingual outreach team** supporting interest, decline, withdraw, and retention campaigns
- Custom **family nurture cadences** aligned with school calendar milestones
- **Decline and withdrawal insight report** with actionable themes and suggested interventions
- **Family sentiment and feedback campaigns** with story collection and analysis
- **Performance Dashboard Access** for real-time campaign and funnel visibility
- **Winback campaign execution** with measurable reactivation attempts and outcomes

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## Roles & Partnership Structure

### Client Partner

Claire Chayet will continue to lead overall strategy, data analysis, and reporting for WSA's Sunset campus. She will collaborate directly with the WSA leadership team and serve as your point of contact for all deliverables, performance reviews, and campaign adjustments.

### SPOT Team

Schola's bilingual School Placement & Outreach Team will conduct all outbound family engagement, lead nurturing, decline/withdraw feedback calls, and sentiment surveys. All activities are tracked and summarized in real time for leadership visibility.

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## Timeline

Phase	Duration	Key Milestones
<b>Phase 1 – Setup &amp; Alignment</b>	2 weeks	Data import, CRM setup, cadence mapping
<b>Phase 2 – Nurture Campaign</b>	Ongoing (10 months)	Real-time dashboard visibility
<b>Phase 3 – Decline &amp; Withdraw Analysis</b>	Month 2-3	Final report & recommendations
<b>Phase 4 – Family Sentiment Campaigns</b>	Quarterly	Feedback and testimonial collection
<b>Phase 5 – Continuous Optimization</b>	Ongoing	Dashboard monitoring & campaign refinement

## Pricing

Service	Scope	Annual Total
SPOT Family Engagement Campaigns	Full-cycle outreach to interested, declined, withdrawn, and current families (bilingual)	\$21,000
Relationship Management (RM) Setup & Reporting	CRM integration, data visualization, and strategic analysis	Included
Client Partner Support	Dedicated strategy, reporting, and leadership coordination	Included

## Expected Outcomes

- >20% improvement in conversion of interested/applicant families to enrollment
- Clear understanding of top 3–5 reasons for declines and withdrawals
- Actionable recommendations on school-level improvements based on real family feedback
- Measurable lift in family sentiment and retention
- Stronger overall family relationships and trust in the Wallace Stegner Academy experience

## Next Steps

1. Approve proposal and sign engagement agreement
2. Provide data access for interest, application, and decline/withdraw lists
3. Schedule kickoff alignment meeting with Claire and SPOT leads

Once confirmed, Schola will launch the first round of outreach within 7 business days.

# Teach Like a CHAMPION<sup>©</sup>

## Wallace Steger Academies

**Wallace Stegner Academy**

980 S Bending River Rd  
Salt Lake City, UT 84104  
US

**Array Education, Inc.**

**ATTN: Teach Like a Champion**  
25 Broadway, 3rd. floor  
New York, NY 10004  
tlac@teachlikeachampion.org

**Anthony Sudweeks**

asudweeks@wsacharter.org

**Prepared by: Jaimie****Buyer Billing Contact:**

jbrillante@teachlikeachampion.org

**Buyer Billing Contact Email:****Buyer Curriculum Contact:****Quote Number:****Buyer Curriculum Contact Email:**

20251010-114105852

Quote Created: October 10, 2025

Quote Expires: October 10, 2026

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<b>Total</b>	<b>\$42,400.00</b>
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## Products & Services

PRODUCTS & SERVICES	QUANTITY	PRICE
RR Unit [MS5]: A Single Shard	4	\$3,200.00 for 3 years
RR Unit [MS5]: Bud, Not Buddy	4	\$3,200.00 for 3 years
RR Unit [MS5]: Number the Stars	4	\$3,200.00 for 3 years
RR Unit [MS5]: The Magician's Nephew	4	\$3,200.00 for 3 years

PRODUCTS & SERVICES	QUANTITY	PRICE
RR Unit [MS6]: Boy: Tales of Childhood	4	\$3,200.00 for 3 years
RR Unit [MS6]: Chains	4	\$3,200.00 for 3 years
RR Unit [MS6]: Esperanza Rising	4	\$3,200.00 for 3 years
RR Unit [MS6]: The Giver	4	\$3,200.00 for 3 years
RR Unit [MS6]: The Outsiders	4	\$0.00 after 100% discount for 3 years
RR Unit [MS7]: House on Mango Street	3	\$2,400.00 for 3 years
RR Unit [MS7]: Lord of the Flies	3	\$2,400.00 for 3 years
RR Unit [MS7]: Roll of Thunder, Hear My Cry	3	\$2,400.00 for 3 years
RR Unit [MS8]: A Raisin in the Sun	3	\$2,400.00 for 3 years
RR Unit [MS8]: Animal Farm	3	\$2,400.00 for 3 years
RR Unit [MS8]: Curious Incident of the Dog in the Nightime	3	\$2,400.00 for 3 years
RR Unit [MS8]: Narrative of the Life of Fredrick Douglass	3	\$2,400.00 for 3 years
RR Unit [HS]: Of Mice and Men	3	\$0.00 after 100% discount for 3 years

PRODUCTS & SERVICES	QUANTITY	PRICE
RR Unit [MS8]: To Kill a Mockingbird	3	\$0.00 after 100% discount for 3 years
RR Unit [MS8]: Wanderings of Odysseus	3	\$0.00 after 100% discount for 3 years
<b>SUMMARY</b>		
One-time subtotal		\$42,400.00 after \$9,200.00 discount

<b>Total</b>	<b>\$42,400.00</b>
<b>Total contract value</b>	<b>\$42,400.00</b>

### Comments

Thank you for your purchase of the RR Curriculum. We are grateful for your continued support. This quote represents unit licenses for the 4 Wallace Steger Academies, SLC, WVC, Kearns and Sunset. A discount of buy 4 units, get the 5th unit free was applied.

**Note from buyer:**

### Purchase terms

By signing this agreement, buyer agrees to Terms and Conditions: <https://connect.teachlikeachampion.org/rr-terms-conditions>

## WSA 12.17.2025 Policy Summary Sheet:

### Amending Bullying and Hazing Policy

SB 223 from the 2025 legislative session amended the definition of bullying and broke it down into “staff bullying” and “student bullying.” Both of these bullying definitions require repeated misconduct or a single egregious act that involves an imbalance of power. In light of SB 223, the USBE amended its bullying rule in R277-613 to not only incorporate the new definitions of staff bullying and student bullying, but to make other changes as well. These other changes include, but aren’t limited to, amending the definition of “civil rights violation,” prohibiting students and employees from creating or distributing sexually explicit or nonconsensual intimate images, and adding “safe digital citizenship” to the list of bullying and hazing topics schools must train on. The school’s Bullying and Hazing Policy has been revised to comply with the changes brought about by SB 223 and the revised rule in R277-613.

### Amending Paid Parental and Postpartum Recovery Leave Policy (CPH, WSA)

This policy is being revised to clarify that the maximum paid postpartum recovery leave period is 3 calendar weeks and the maximum paid parental leave period is 15 contract days. The revisions specify how the leave periods work and whether non-contracted workdays occurring during the leave period count or do not count toward the applicable and allotted leave period. The revisions also specify that paid parental leave may be used intermittently.

### Amending Instructional Materials Policy

HB 21 from the 2025 legislative session renumbered various parts of the criminal code, including the definitions of “objective sensitive material” and “subjective sensitive material.” Those definitions are included in the school’s Instructional Materials Policy and the USBE has asked schools to update their policies with the correct/updated code citations. The proposed revisions to the policy include only the updated code citations. No other changes have been made to the policy.

### Amending Cash Handling Policy

School administration would like to revise the Cash Handling Policy to allow for the use of peer-to-peer payment applications (Venmo, PayPal, etc.) at the school. The proposed revisions provide various control rules and procedures the school must follow if such applications are used. For example, any peer-to-peer payment application may only be used by the school to receive funds from third parties, not to make a payment to third parties.

### Amending Credit Card Policy

The Chief Executive Officers would like to amend the Credit Card Policy to increase the total credit limit of their credit cards from up to \$30k to up to \$60k. The intent of this change is to

align the policy with the school's actual operational needs, as the CEOs often hit the current credit limit before necessary purchases need to be made. Increasing the limit will help reduce transaction delays, avoid workarounds caused by their credit cards being maxed out, and allow time-sensitive purchases to be completed efficiently. All of the same oversight, approval, and reconciliation controls will remain in place to ensure continued fiscal accountability.

#### New Hotline Complaint Policy

R277-123 requires each school to have on its website a link to the school's local education hotline or a link to the USBE's public education hotline so that the public can report alleged violations. The school does not have its own local hotline but does have a link on its website to the USBE's public education hotline. R277-123 also now requires each school to adopt a hotline complaint policy. Per R277-123, this policy must establish how a school will respond to hotline complaints and contain steps a school must go through when responding to such complaints. The proposed Hotline Complaint Policy tracks the requirements in R277-123. It also explains that if a hotline complaint received by the school should have been addressed via the school's applicable grievance policy, the school may inform the USBE's Internal Audit Department (the department who handles USBE hotline complaints). This policy emphasizes that complainants should not use the hotline to bypass the school's grievance policies.

**Wallace Stegner Academy**  
**Policy: Bullying & Hazing Policy**  
**Adopted: 9.21.23**  
**Approved:**



**Deleted: 12.03.2024**

### **Purpose**

The purpose of this policy is to prohibit bullying, cyber-bullying, hazing, retaliation, and abusive conduct involving Wallace Stegner Academy (the "School") students and employees. The School's Board of Directors (the "Board") has determined that a safe, civil environment in School is necessary for students to learn and achieve high academic standards and that conduct constituting bullying, cyber-bullying, hazing, retaliation, and abusive conduct disrupts both a student's ability to learn and the School's ability to educate its students in a safe environment.

### **Policy**

#### **Prohibited Conduct**

Bullying, cyber-bullying, hazing, retaliation, and abusive conduct towards students and employees are against federal, state, and local policy and are not tolerated by the School. The School is committed to providing all students with a safe and civil environment in which all members of the School community are treated with dignity and respect. To that end, the School has in place policies, procedures, and practices that are designed to reduce and eliminate this conduct – including, but not limited to, civil rights violations – as well as processes and procedures to deal with such incidents. Bullying, cyber-bullying, hazing, retaliation, and abusive conduct towards students and/or employees by students and/or employees will not be tolerated in the School. Likewise, abusive conduct by students or parents or guardians against School employees is prohibited by the School and will not be tolerated in the School.

In order to promote a safe, civil learning environment, the School prohibits all forms of bullying of students and School employees (a) on School property, (b) at a School-related or sponsored event, or (c) while the student or School employee is traveling to or from School property or a School-related or sponsored event.

The School prohibits all forms of bullying, cyber-bullying, hazing, abusive conduct or retaliation against students and School employees at any time and any location.

Students and School employees are prohibited from retaliating against any student, School employee or an investigator for, or witness of, an alleged incident of bullying, cyber-bullying, hazing, abusive conduct, or retaliation.

Students and School employees are prohibited from making false allegations of bullying, cyber-bullying, hazing, abusive conduct, or retaliation against a student or School employees.

Students and School employees are prohibited from sharing a recording of an act of bullying, cyber-bullying, hazing, abusive conduct, and retaliation in order to impact or encourage future incidents.

[Students and School employees are prohibited from creating or distributing sexually explicit or nonconsensual intimate images.](#)

In addition, School employees, coaches, sponsors and volunteers shall not permit, condone or tolerate any form of hazing, bullying, cyber-bullying, or abusive conduct and shall not plan, direct, encourage, assist, engage or participate in any activity that involves hazing, bullying, cyber-bullying, or abusive conduct.

Any bullying, cyber-bullying, hazing, abusive conduct, or retaliation that is found to be targeted at a federally protected class is further prohibited under federal anti-discrimination laws and is subject to OCR compliance regulations.

[Definitions](#)

**Abusive Conduct** – For purposes of this policy, “abusive conduct” means verbal, nonverbal, or physical conduct of a parent or guardian or student directed toward a School employee that, based on its severity, nature, and frequency of occurrence, a reasonable person would determine is intended to cause intimidation, humiliation, or unwarranted distress. A single act does not constitute abusive conduct.

**Action Plan** – For purposes of this policy, “action plan” means a process to address an incident [of bullying, cyber-bullying, hazing, or retaliation](#).

**Bullying** – For purposes of this policy, "bullying" means [student bullying and staff bullying](#).

**Civil Rights Violations** – For purposes of this policy, “civil rights violations” means [violations as outlined in the following federal laws:](#)

- [\(1\) Title VI of the Civil Rights Act of 1964 \(prohibits discrimination on the basis of race, color, or national origin\);](#)
- [\(2\) Title IX of the Education Amendments of 1972 \(prohibits discrimination on the basis of sex\);](#)
- [\(3\) Section 504 of the Rehabilitation Act of 1973 \(prohibits discrimination on the basis of disability\); or](#)
- [\(4\) Title II of the Americans with Disabilities Act \(prohibits discrimination on the basis of disability\).](#)

**Cyber-bullying** – For purposes of this policy, "cyber-bullying" means using the Internet, a cell phone, or another device to send or post text, video, or an image with the intent or knowledge, or with reckless disregard, that the text, video, or image will hurt, embarrass, or threaten an individual, regardless of whether the individual directed,

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**Deleted:** a School employee or student intentionally committing a written, verbal, or physical act against a School employee or student that a reasonable person under the circumstances should know or reasonably foresee will have the effect of:

- [\(1\) causing physical or emotional harm to the School employee or student;](#)
- [\(2\) causing damage to the School employee's or student's property;](#)
- [\(3\) placing the School employee or student in reasonable fear of:](#)
  - [\(a\) harm to the School employee's or student's physical or emotional well-being; or](#)
  - [\(b\) damage to the School employee's or student's property;](#)
- [\(4\) creating a hostile, threatening, humiliating, or abusive educational environment due to:](#)
  - [\(a\) the pervasiveness, persistence, or severity of the actions; or](#)
  - [\(b\) a power differential between the bully and the target; or](#)

[\(5\) substantially interfering with a student having a safe school environment that is necessary to facilitate educational performance, opportunities, or benefits.](#)

This conduct constitutes bullying, regardless of whether the person against whom the conduct is committed directed, consented to, or acquiesced in, the conduct. In addition, bullying is commonly understood as aggressive behavior that is intended to cause distress and harm; exists in a relationship in which there is an imbalance of power and strength; and is repeated over time.

Bullying may also include relational aggression or indirect, covert, or social aggression, including rumor spreading, intimidation, enlisting a friend to assault a child, and social isolation.

**Deleted:** bullying, cyber-bullying, harassment, abusive conduct, or hazing that is targeted at a federally protected class.

consented to, or acquiesced in the conduct, or voluntarily accessed the electronic communication.

***Hazing*** – For purposes of this policy, “hazing” means a School employee or student intentionally, knowingly, or recklessly committing an act or causing another individual to commit an act toward a School employee or student that:

- (1) (a) endangers the mental or physical health or safety of a School employee or student;  
(b) involves any brutality of a physical nature, including whipping, beating, branding, calisthenics, bruising, electric shocking, placing of a harmful substance on the body, or exposure to the elements;  
(c) involves consumption of any food, alcoholic product, drug, or other substance or other physical activity that endangers the mental or physical health and safety of a School employee or student; or  
(d) involves any activity that would subject a School employee or student to extreme mental stress, such as sleep deprivation, extended isolation from social contact, or conduct that subjects a School employee or student to extreme embarrassment, shame, or humiliation; and
- (2) (a)(i) is committed for the purpose of initiation into, admission into, affiliation with, holding office in, or as a condition for membership in a School or School sponsored team, organization, program, club, or event; or  
(ii) is directed toward a School employee or student whom the individual who commits the act knows, at the time the act is committed, is a member of, or candidate for membership in, a School or School sponsored team, organization, program, club, or event in which the individual who commits the act also participates.
- (3) The conduct described above constitutes hazing, regardless of whether the School employee or student against whom the conduct is committed directed, consented to, or acquiesced in, the conduct.

***Incident*** – For purposes of this policy, “incident” means a verified incident of bullying, cyber-bullying, hazing, abusive conduct, or retaliation that is prohibited in Utah Code § 53G-9-601 *et seq.*

***Retaliate or Retaliation*** – For purposes of this policy, “retaliate or retaliation” means an act or communication intended:

- (1) as retribution against a person for reporting bullying or hazing; or
- (2) to improperly influence the investigation of, or the response to, a report of bullying or hazing.

***School Employee*** – For purposes of this policy, “School employee” means an individual working in the individual’s official capacity as:

- (1) a School teacher;

***Deleted: Federally protected class*** – For purposes of this policy, “federally protected class” means any group protected from discrimination under federal law, such as:

- (1) Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color, or national origin.¶
- (2) Title IX of the Education Amendments of 1972, which prohibits discrimination on the basis of sex.¶
- (3) Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability.¶
- (4) Other areas included under these acts which include religion, gender, and sexual orientation.¶

- (2) a School staff member;
- (3) a School administrator; or
- (4) an individual:
  - (a) who is employed, directly or indirectly, by the School; and
  - (b) who works on the School's campus(es).

**Staff Bullying** – For purposes of this policy, “staff bullying” means a School employee, with the intent to cause harm, repeatedly committing a written, verbal, or physical act against a student or another School employee, or engaging in a single egregious act toward another employee involving an imbalance of power, that:

- (1) creates an environment that a reasonable person would find hostile, threatening, or humiliating; and
- (2) substantially interferes with a student’s or employee’s educational or professional performance, opportunities, or benefits.

**Student Bullying** – For purposes of this policy, “student bullying” means one or more students, with the intent to cause harm, repeatedly committing a written, verbal, or physical act against another student, or engaging in a single egregious act toward another student involving an imbalance of power, that:

- (1) creates an environment that a reasonable person would find hostile; and
- (2) interferes with a student’s educational performance, opportunities, or benefits.

“Student bullying” and “staff bullying” do not mean instances of:

- (1) ordinary teasing, horseplay, argument, or peer conflict;
- (2) reasonable correction of behavior by a School employee; or
- (3) reasonable coaching strategies and techniques by a School employee who is a coach.

**Verification** – For purposes of this policy, “verification” means that an alleged incident has been found to be substantiated through a formal investigation process done by the School as outlined in this policy.

**Volunteer** – For purposes of this policy, “volunteer” means a non-employee with significant, unsupervised access to students in connection with a School assignment.

#### **Reporting Prohibited Conduct**

Students who have been subjected to or witnessed bullying, cyber-bullying, hazing, or retaliation, and students who have witnessed abusive conduct, must promptly report such prohibited conduct to any School personnel orally or in writing. School personnel who receive reports of such prohibited conduct must report them to the Principal.

School employees who have been subjected to or witnessed hazing, bullying, cyber-bullying, abusive conduct, or retaliation must report such prohibited conduct to the School's Principal orally or in writing.

Each report of prohibited conduct shall include:

- (1) the name of complaining party;
- (2) the name of person subjected to the prohibited conduct (if different than complaining party);
- (3) the name of perpetrator (if known);
- (4) the date and location of the prohibited conduct; and
- (5) a statement describing the prohibited conduct, including names of witnesses (if known).

In connection with a report of prohibited conduct, students and School employees may request that their identity be kept anonymous, and reasonable steps shall be taken by the Principal and others involved in the reporting and investigation to maintain the anonymity of such individuals, if possible. School employees must take strong responsive action to prevent retaliation, including assisting students who are subjected to prohibited conduct and his or her parents or guardians in reporting subsequent problems and new instances of prohibited conduct.

The Principal or his/her designee shall promptly make a reasonably thorough investigation of all complaints of prohibited conduct, including, to the extent possible, anonymous reports, and shall, in accordance with the Consequences of Prohibited Behavior section below, administer appropriate discipline to all individuals who violate this policy. Formal disciplinary action is prohibited based solely on an anonymous report.

The Principal may report to OCR all incidents of bullying, hazing, cyber-bullying, abusive conduct, or retaliation that he/she reasonably determines may be violations of a student's or employee's civil rights.

It is the School's policy, in compliance with state and federal law, that students have a limited expectation of privacy on the School's computer equipment and network system, and routine monitoring or maintenance may lead to discovery that a user has violated School policy or law. Also, individual targeted searches will be conducted if there is reasonable suspicion that a user has violated policy or law. Personal electronic devices of any student suspected of violation of this policy will be confiscated for investigation and may be turned over to law enforcement.

#### Investigation of Alleged Incidents

The School will investigate all allegations of bullying, cyber-bullying, hazing, retaliation, and abusive conduct in accordance with this policy and applicable law. The Principal or his/her designee will investigate such allegations, and the School shall ensure that the investigator is provided adequate training to conduct such an investigation. The Chief Executive Officer(s) or his/her designee will be the point person with training and expertise to assist, direct, and supervise training of other employees in the responsibilities set forth in this paragraph.

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The School will investigate these alleged incidents by interviewing:

(1) the individual who was allegedly targeted;

(2) the individual who is alleged to have engaged in the prohibited conduct;

(3) the parents or guardians of the students who were allegedly targeted and the individual who is alleged to have engaged in prohibited conduct;

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(4) any witnesses;

(5) School staff familiar with the student who was allegedly targeted;

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(6) School staff familiar with the individual who is alleged to have engaged in prohibited conduct; or

(7) Other individuals who may provide additional information.

The individual who investigates an alleged incident will inform an individual being interviewed that (1) to the extent allowed by law, the individual is required to keep all details of the interview confidential; and (2) further reports of bullying will become part of the review. However, the confidentiality requirement described in this paragraph does not apply to conversations with law enforcement, requests for information pursuant to a warrant or subpoena, a state or federal reporting requirement, or other reporting required by R277-613.

In conducting this investigation, the School may (1) review disciplinary reports of involved students; and (2) review physical evidence, including video or audio, notes, email, text messages, social media, or graffiti.

The School will report alleged incidents of bullying, cyber-bullying, hazing, retaliation, and abusive conduct to law enforcement when the Principal reasonably determines that the alleged incident may have violated criminal law.

The School shall follow up with the parents or guardians of all parties to:

(1) inform parents or guardians when an investigation is concluded;

(2) inform parents or guardians what safety measures will be in place for their child, as determined by the investigation;

(3) provide additional information about the investigation or the resolution consistent with the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. 1232g (“FERPA”); and

(4) inform parents or guardians of the School’s Parent Grievance Policy if the parents or guardians disagree with the resolution of the investigation.

If the investigation results in a verification of an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct, the School shall create and implement an action plan for each such incident in accordance with Utah Code § 53G-9-605.5 and R277-613.

In addition, following verification of an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct, the Principal may, if he/she determines it is appropriate:

(1) use accountability practices in accordance with policies established by the School; and

(2) provide supportive services designed to preserve the student’s access to educational opportunities and a sense of safety.

However, a student to whom an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct is directed is not required to participate in a restorative justice practice with an individual who is alleged to have engaged in prohibited conduct. If the School would like any student to participate in a restorative justice practice, the School will notify the student’s parent or guardian of the restorative justice practice and obtain consent from the student’s parent or guardian before including the student in the process.

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#### Parental Notification

The Principal or his/her designee will timely notify a student’s parent or guardian if:

(1) the student threatens suicide; or

(2) the student is involved in an incident (including if the student is subjected to the incident or is the person who caused the incident) and of the action plan to address the incident.

The Principal or his/her designee will attempt to contact the parent or guardian by telephone to provide this notification and to discuss the matter. If the parent or guardian is not available by telephone, the Principal or his/her designee will provide the parent or guardian the required notification by email.

The Principal or his/her designee will produce and maintain a record that:

(1) verifies that the School notified each parent or guardian as required above. If an in-person meeting takes place, the Principal or his/her designee may ask the parent or guardian to sign the record acknowledging that the notification was

provided. If a telephone conversation takes place, the Principal or his/her designee may document on the record such details as the date and time of the telephone call, who was spoken to, and brief notes regarding the notification that was provided and the content of the conversation. If an email is sent, the Principal or his/her designee will retain a copy of the email; and

- (2) tracks implementation of the action plan addressing the incident, if applicable.

The School will retain the record for at least as long as the student is enrolled at the School and will provide or expunge the record in accordance with Utah Code § 53G-9-604. The School will maintain the confidentiality of the record in accordance with the state and federal student data privacy laws referenced in Utah Code § 53G-9-604.

In addition to notifying the parent or guardian as set forth above, the Principal or his/her designee will provide the parent or guardian with the following:

- (1) suicide prevention materials and information as recommended by the Utah State Board of Education in accordance with Utah Code § 53G-9-604(2)(b);
- (2) information on ways to limit a student's access to fatal means, including firearms or medication; and
- (3) information and resources on the healthy use of social media and online practices as provided in R277-613.

#### Action Plan to Address Incidents

Following verification of an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct, the School shall develop and implement an action plan. The action plan shall include:

- (1) with respect to the targeted student and in direct coordination with the student's parent or guardian:
  - (a) a tailored response to the incident that addresses the student's needs;
  - (b) a mechanism to consider consequences or accommodations the student may need regarding decreased exposure or interactions with the student who caused the incident;
  - (c) notification of the consequences and plan to address the behavior of the student who caused the incident, to the extent allowed by FERPA;
  - (d) support measures designed to preserve the student's access to educational services and opportunities; and
  - (e) to the extent available, access to other resources the parent requests for the student; and
- (2) with respect to the student who caused the incident and in direct coordination with the student's parent or guardian:
  - (a) a range of tailored and appropriate consequences, making reasonable effort to preserve the student's access to educational services and activities;

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- (b) a process to determine and provide any needed resources related to the underlying cause of the incident;
- (c) supportive measures designed to preserve the student's access to educational services and opportunities while protecting the safety and well-being of other students; and
- (d) a process to remove the student from School in an emergency situation, including a description of what constitutes an emergency.

The School may not include in an action plan a requirement that the student to whom the incident was directed change the student's:

- (1) educational schedule or placement; or
- (2) participation in a School sponsored sport, club, or activity.

The School shall try to involve the parent or guardian of a student who was involved in an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct in the development and implementation of an action plan. However, if, after the School attempts to involve a parent or guardian in the development and implementation of an action plan, the parent or guardian chooses to not participate in the process, the School may develop and implement an action plan without the parent or guardian's involvement.

The School shall communicate with the parent or guardian of each student involved in an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct about the implementation of the action plan. Specifically, the School shall provide regular updates on the implementation of the action plan to each such parent or guardian. The updates shall include:

- (1) the outcome of the School's investigation (if not already provided at the conclusion of the investigation);
- (2) a discussion of safety considerations for the student who is the subject of the incident; and
- (3) an explanation of the School's process for addressing the incident.

The Principal or his/her designee shall oversee the implementation of the action plan, monitor the implementation of the communication plan/requirements within the action plan, and assist the School with case-specific needs when the School is addressing an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct.

#### Consequences of Prohibited Behavior

If, after an investigation, a student is found to be in violation of this policy by participating in or encouraging conduct prohibited by this policy, the student shall be disciplined by appropriate measures up to, and including, suspension and expulsion, pursuant to Utah Code § 53G-8-205 and School policy, removal from participation in School activities, and/or discipline in accordance with regulations of the U.S. Department of Education Office for Civil Rights (OCR).

If, after an investigation, a School employee is found to be in violation of this policy, the employee shall be disciplined by appropriate measures, which may include termination, reassignment or other appropriate action.

School officials have the authority to discipline students for off-campus or online speech that causes or threatens a substantial disruption to School operations, including violent altercations or a significant interference with a student's educational performance and involvement in School activities.

#### Grievance Process for School Employees

As explained above, a School employee who has experienced abusive conduct must report the abusive conduct to the School Principal orally or in writing. If the School employee is not satisfied with the Principal or designee's investigation of the abusive conduct and/or the resulting disciplinary action (or recommended disciplinary action) against the perpetrator, the School employee may address/raise the issue in accordance with the School's Staff Grievance Policy.

#### Grievance Process for Parents and Guardians

A parent or guardian of a student who caused an incident of bullying, cyber-bullying, hazing, retaliation, or abusive conduct may appeal one or more of the consequences included in an action plan in accordance with the School's Parent Grievance Policy.

#### Additional Provisions

The Principal will ensure compliance with OCR regulations when civil rights violations are reported, as follows:

- (1) Once the School knows or reasonably should know of possible student-on-student bullying, cyber-bullying, or hazing, the School must take immediate and appropriate action to investigate.
- (2) If it is determined that the bullying, cyber-bullying, or hazing of a student did occur as a result of the student's membership in a protected class, the School shall take prompt and effective steps reasonably calculated to:
  - (a) end the bullying, cyber-bullying, or hazing;
  - (b) eliminate any hostile environment; and
  - (c) prevent its recurrence.
- (3) These duties are the School's responsibilities even if the misconduct is also covered by a separate anti-bullying policy and regardless of whether the student makes a complaint, asks the School to take action, or identifies the bullying, cyber-bullying, or hazing as a form of discrimination.

The Principal will take reasonable steps to ensure that any person subjected to prohibited conduct will be protected from further hazing, bullying, cyber-bullying,

abusive conduct, and retaliation and that any student or School employee who reports such prohibited conduct will be protected from retaliation.

If the Principal believes that any person who was subjected to or who caused conduct prohibited by this policy would benefit from counseling, the Principal may refer such individuals for counseling.

If the Principal believes that it would be in the best interests of the individuals involved, the Principal may involve the parents or guardians of a student who was subjected to or a student who caused hazing, bullying, cyber-bullying, or retaliation in the process of responding to and resolving conduct prohibited by this policy.

Incidents of bullying, cyber-bullying, hazing, and retaliation will be reported in the School's student information system as required.

#### Student Assessment

~~The Principal or his/her designee will assess the prevalence of bullying, cyber-bullying, hazing, and retaliation in the School, specifically locations where students are unsafe and additional adult supervision may be required, such as playgrounds, hallways, and lunch areas.~~

#### Training

The Principal will ensure that School students, employees, coaches, and volunteers receive training on bullying, cyber-bullying, hazing, retaliation, and abusive conduct from individuals qualified to provide such training. The training shall meet the standards established by the Utah State Board of Education's rules and include information on:

- (1) bullying, cyber-bullying, hazing, retaliation, and abusive conduct;
- (2) discrimination under the following federal laws:
  - (a) Title VI of the Civil Rights Act of 1964;
  - (b) Title IX of the Education Amendments of 1972;
  - (c) Section 504 of the Rehabilitation Act of 1973; and
  - (d) Title II of the Americans with Disabilities Act of 1990;
- (3) how bullying, cyber-bullying, hazing, retaliation, and abusive conduct are different from discrimination and may occur separately from each other or in combination;
- (4) how bullying, cyber-bullying, hazing, retaliation, and abusive conduct are prohibited based upon ~~race, color, national origin, sex, disability, or religion~~;
- (5) the right of free speech and how it differs for students, employees, and parents or guardians; ~~and~~
- (6) ~~safe digital citizenship.~~

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The training will also complement the suicide prevention program required for students under R277-620 and the suicide prevention training required for licensed educators consistent with Section 53G-9-704(1), and also include information on when issues relating to R277-613 may lead to student or employee discipline.

The training shall be offered to:

- (1) new school employees, coaches, and volunteers within the first year of employment or service;
- (2) all School employees, coaches, and volunteers at least once every three years after the initial training; and
- (3) all students (regardless of whether they are involved in athletics or extracurricular activities or clubs) at a frequency determined by the Principal.

In addition to the training requirements described above, any student, employee, or volunteer coach participating in a School sponsored athletic program, both curricular and extracurricular, or extracurricular club or activity, shall, prior to participating in the athletic program or activity, participate in bullying, cyber-bullying, hazing, retaliation, and abusive conduct prevention training. This training shall be offered to new participants on an annual basis and to all participants at least once every three years. The School will inform student athletes and extracurricular club members of prohibited activities under R277-613 and potential consequences for violation of the law and the rule.

The School will maintain training participant lists or signatures and provide them to the Utah State Board of Education upon request.

Liaison to Utah State Board of Education

The Chief Executive Officer(s) or his/her designee shall act as the School's liaison to the Utah State Board of Education regarding bullying, cyber-bullying, hazing, abusive conduct, and retaliation.

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Distribution of Policy and Signed Acknowledgement

The School will inform students, parents or guardians, School employees, and volunteers that hazing, bullying, cyber-bullying, abusive conduct, and retaliation are prohibited by distributing a copy of this policy to such individuals annually. A copy of this policy will also be posted on the School's website and included in any student conduct or employee handbooks issued by the School.

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On an annual basis, School employees, students who are at least eight years old, and parents or guardians of students shall sign a statement indicating that they have received this policy.

## **Paid Parental and Postpartum Recovery Leave**

In accordance with Utah Code § 53G-11-209, the School offers qualified employees paid parental and postpartum recovery leave to enable employees to care for and bond with their new child and to recover from childbirth. This policy is effective July 1, 2025.

### **Definitions**

For purposes of this policy:

“Parental leave” means leave hours the School provides to a parental leave eligible employee.

“Parental leave eligible employee” means a School employee who receives regular paid personal time off (PTO) benefits from the School and is:

- (a) a birth parent as defined in Utah Code § 78B-6-103;
- (b) legally adopting a minor child, unless the individual is the spouse of the pre-existing parent;
- (c) the intended parent of a child born under a validated gestational agreement in accordance with Title 81, Chapter 5, Part 8, Gestational Agreement;
- (d) appointed the legal guardian of a minor child or incapacitated adult; or
- (e) a foster parent of a minor child.

“Postpartum recovery leave” means leave hours the School provides to a postpartum recovery leave eligible employee to recover from childbirth that occurs at 20 weeks or greater gestation.

“Postpartum recovery leave eligible employee” means an employee:

- (a) who receives regular paid personal time off (PTO) benefits from the School; and
- (b) who gives birth to a child.

“Qualified employee” means:

- (a) a parental leave eligible employee; or
- (b) a postpartum recovery leave eligible employee.

“Retaliatory action” means to do any of the following regarding an employee:

- (a) dismiss the employee;
- (b) reduce the employee’s compensation;
- (c) fail to increase the employee’s compensation by an amount to which the employee is otherwise entitled to or was promised;
- (d) fail to promote the employee if the employee would have otherwise been promoted; or
- (e) threaten to take an action described immediately above.

### **Paid Parental Leave**

The School allows a parental leave eligible employee to use up to 15 contracted workdays of paid parental leave for:

- (a) the birth of the parental leave eligible employee’s child;
- (b) the adoption of a child;
- (c) the appointment of legal guardianship of a child or incapacitated adult; or

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(d) the placement of a foster child in the parental leave eligible employee's care.

Parental leave as described above:

- (a) may not be used before the day on which:
  - (1) the parental leave eligible employee's child is born;
  - (2) the parental leave eligible employee adopts a child;
  - (3) the parental leave eligible employee is appointed legal guardian of a child or incapacitated adult; or
  - (4) a foster child is placed in the parental leave eligible employee's care;
- (b) may not be used more than six months after the date described immediately above;
- (c) may be used intermittently;
- (d) runs concurrently with FMLA leave, if applicable to the parental leave eligible employee; and
- (e) runs consecutively to postpartum recovery leave, if applicable to the parental leave eligible employee.

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A parental leave eligible employee's paid parental leave does not increase if the parental leave eligible employee:

- (a) has more than one child born from the same pregnancy;
- (b) adopts more than one child;
- (c) has more than one foster child placed in the parental leave eligible employee's care; or
- (d) is appointed legal guardian of more than one child or incapacitated adult.

A parental leave eligible employee may not use more than 15 contracted workdays of paid parental leave within a single 12-month period, regardless of whether during that 12-month period the parental leave eligible employee:

- (a) becomes the parent of more than one child;
- (b) adopts more than one child;
- (c) has more than one foster child placed in the parental leave eligible employee's care; or
- (d) is appointed legal guardian of more than one child or incapacitated adult.

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### **Paid Postpartum Recovery Leave**

The School allows a postpartum recovery leave eligible employee to use up to three calendar weeks of paid postpartum recovery leave for recovery from childbirth that occurs at 20 weeks or greater gestation.

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Postpartum recovery leave as described above:

- (a) shall be used starting on the day on which the postpartum recovery leave eligible employee gives birth, unless a health care provider certifies that an earlier start date is medically necessary;
- (b) shall be used in a single continuous period, unless otherwise authorized in writing by the Chief Executive Officer(s);
- (c) runs concurrently with FMLA leave, if applicable to the postpartum recovery leave eligible employee; and
- (d) runs consecutively to parental leave.

A postpartum recovery leave eligible employee's paid postpartum recovery leave does not increase if the postpartum recovery leave eligible employee has more than one child born from the same pregnancy.

#### **Leave Period**

The maximum amount of paid postpartum recovery leave available to qualified employees under this policy is three calendar weeks. Any non-contracted workdays (such as holidays, days during summer break, etc.) that occur during a qualified employee's paid postpartum recovery leave count toward the three-calendar week leave period.

The maximum amount of paid parental leave available to qualified employees under this policy is 15 contracted workdays. Any non-contracted workdays (such as holidays, days during summer break, etc.) that occur during a qualified employee's paid parental leave do not count toward the 15-contracted workday leave period.

#### **Notice of Plan to Take Leave**

Qualified employees shall give their Campus Principal or the School's Chief Executive Officer(s) notice at least 30 days before the day on which the qualified employee plans to:

- (a) begin using parental leave or postpartum recovery leave; and
- (b) stop using postpartum recovery leave.

If circumstances beyond the qualified employee's control prevent the qualified employee from giving notice as described above, the qualified employee shall give the School each notice described above as soon as reasonably practicable.

All such notices shall be reviewed by the employee's Campus Principal and Chief Executive Officer(s). If the employee providing notice does not meet the definition of a qualified employee under this policy (and is therefore not entitled to paid parental or postpartum recovery leave), the Campus Principal or Chief Executive Officer(s) shall inform the employee. Employees may be required to provide documentation supporting the need for parental or postpartum recovery leave.

#### **Other Leave**

Except with respect to FMLA leave, the School may not charge parental leave or postpartum recovery leave against a qualified employee's regular paid personal time off (PTO) or any other leave a qualified employee is entitled to under the School's leave policies.

If a qualified employee is eligible to receive paid parental leave and/or postpartum recovery leave under this policy and simultaneously is eligible to receive paid FMLA leave from the School, the total amount of the paid leave received by the employee shall not exceed the employee's regular salary.

### **Employee Benefits During Leave**

During the time a qualified employee uses parental leave or postpartum recovery leave, the qualified employee shall continue to receive all employment related benefits and payments at the same level that the qualified employee received immediately before beginning the parental leave or postpartum recovery leave, provided that the qualified employee pays any required employee contributions.

### **Employee Position after Leave**

Following the expiration of a qualified employee's parental leave or postpartum recovery leave, the School shall ensure that the qualified employee may return to:

- (a) the position that the qualified employee held before using parental leave or postpartum recovery leave; or
- (b) a position within the School that is equivalent in seniority, status, benefits, and pay to the position that the qualified employee held before using parental leave or postpartum recovery leave.

Despite the foregoing, if during the time a qualified employee uses parental leave or postpartum recovery leave the School experiences a reduction in force and, as part of the reduction in force, the qualified employee's employment would have been terminated had the qualified employee not been using the parental leave or postpartum recovery leave, the School may terminate the qualified employee's employment in accordance with any applicable process or procedure as if the qualified employee were not using the parental leave or postpartum recovery leave. In addition, upon termination of a qualified employee's employment (for any reason), the employee is not entitled to be paid for any unused parental leave or postpartum recovery leave.

### **Retaliatory Action**

The School may not interfere with or otherwise restrain a qualified employee from using parental leave or postpartum recovery leave in accordance with this policy. In addition, the School may not take retaliatory action against a qualified employee for using parental leave or postpartum recovery leave in accordance with Utah Code § 53G-11-209.

### **Part-Time Qualified Employees**

In the event a qualified employee of the School is also a part-time employee, the employee shall be allowed to use the amount of parental leave or postpartum recovery leave available to the qualified employee under this policy on a pro rata basis.



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## Purpose

The purpose of this policy is to establish the parameters by which Wallace Stegner Academy (the "School") will select, approve, and purchase instructional materials. The purpose of this policy and accompanying procedures is to also set forth the School's process for reviewing challenges to instructional materials.

## Definitions

"Instructional materials" are the resources used by educators to deliver curriculum or support student learning. These materials may be commercially available or School-created and include such materials as textbooks, reading materials, videos, digital materials, websites, online applications, and live presentations. "Instructional materials" do not include learning material used in a concurrent enrollment, advanced placement, or international baccalaureate program or class, or another class with required instructional material that is not subject to selection by the School.

"Sensitive material" means an instructional material that constitutes objective sensitive material or subjective sensitive material. "Sensitive material" does not include the instructional material outlined in Utah Code § 53G-10-103(1)(h)(ii).

"Objective sensitive material" means an instructional material that constitutes pornographic or indecent material, as that term is defined in Utah Code § [76-5c-208](#), under the non-discretionary standards described in Utah Code § [76-5c-207\(1\)\(a\)\(i\)](#), or (ii), or (iii).

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"Subjective sensitive material" means an instructional material that constitutes pornographic or indecent material, as that term is defined in Utah Code § [76-5c-208](#), under the following factor-balancing standards:

- (a) material that is harmful to minors under Utah Code § [76-5c-101](#);
- (b) material that is pornographic under Utah Code § [76-5c-101](#); or
- (c) material that includes certain fondling or other erotic touching under Utah Code § [76-5c-207\(1\)\(a\)\(i\)\(C\)-\(D\)](#).

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"School community parent" means a parent who has a student currently attending the School, or will have a student enrolled in the School within one year, where the challenged instructional material is being reviewed in accordance with this policy and Utah Code § 53G-10-103(4).

“School setting” means the School’s classrooms, library, and property. “School setting” also includes School-sponsored or required activities, including assemblies, guest lectures, live presentations, or other events.

“Stakeholder” for purposes of this policy means:

- (a) an employee of the School;
- (b) a student who is enrolled in the School;
- (c) a parent of a child who is enrolled in the School; or
- (d) a member of the School’s Board of Directors.

## Policy

The School shall comply with the requirements of Utah law and Utah State Board of Education (“USBE”) rule regarding the selection, approval, purchase, and review of instructional materials, including but not limited to Utah Administrative Code R277-468 and R277-469, Utah Code § 53G-10-103 and, when applicable, Utah Code § 53G-5-404.

The School’s purpose in managing the selection, approval, purchase, and review of instructional materials is to implement, enrich, and support the School’s educational program. It is also to prioritize protecting students from the harmful effects of illicit pornography over other considerations in evaluating instructional materials.

### Criteria for Instructional Materials

Instructional materials should contribute to the intellectual development and positive character of students. Instructional materials used by the School shall:

- (a) be consistent with the Utah Core standards;
- (b) be consistent with the principles of individual freedom as defined in Utah Code § 53G-10-206;
- (c) not constitute sensitive material as defined in Utah Code § 53G-10-103;
- (d) not be prohibited discriminatory practice as described in Utah Code § 53B-1-118; and
- (e) comply with all other applicable state laws and USBE rules.

| Selection and Approval of Instructional Materials by the Chief Executive Officer(s)

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| The Board of Directors (the “Board”) delegates to the School Chief Executive Officer(s) the authority and responsibility to select and approve instructional materials for the School, except under circumstances where the Board is specifically required by law or a different School policy to approve instructional materials.

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| The Chief Executive Officer(s) shall select and approve instructional materials that meet the criteria set forth in this policy. When considering instructional materials, the Chief Executive Officer(s) may review the USBE’s recommended instructional materials

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(RIMs), but the Chief Executive Officer(s) is not required to select RIMs if there are other instructional materials available that meet the criteria set forth in this policy.

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The Chief Executive Officer(s) shall involve School community parents and instructional staff in the consideration of instructional materials. The Chief Executive Officer(s) has discretion as to how to involve such parents and instructional staff in this process.

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#### Selection and Approval of Instructional Materials by the Board

If the Board is required by law or School policy to approve instructional materials for use in the classroom, the Board shall do the following (in order) prior to approving the instructional materials:

- (a) post the recommended instructional materials online to allow for public review or, for copyrighted material, make the instructional materials available at the School for public review; and
- (b) hold at least two Board meetings where the recommended instructional materials is on the agenda and allow an opportunity at those Board meetings for School educators and parents of students enrolled in the School to express views and opinions on the recommended instructional material.

The Board may approve the recommended instructional materials in an open and regular Board meeting after the requirements above have been satisfied. The vote to approve the recommended instructional materials may occur at the second of the two Board meetings described in subsection (b) above.

In accordance with Utah Code § 53G-5-404(13), the requirements in this section apply only if the Board is approving instructional materials. The requirements do not apply if the Board is not approving instructional materials and instead only the Chief Executive Officer(s) is selecting and approving instructional materials (which Utah Code § 53G-5-404(13) refers to as "learning material"). In addition, the requirements in this section do not apply to educators' selection of supplemental materials or resources.

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Any instructional materials approved by the Board shall meet the criteria set forth in this policy.

#### Purchase of Instructional Materials

The School shall follow its Purchasing and Disbursement Policy in connection with the purchase of any instructional materials, regardless of whether the instructional materials are selected and approved by the Chief Executive Officer(s) or by the Board. The School shall identify all costs associated with instructional materials prior to purchasing the instructional materials, including any implementation and professional development costs.

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### Educator Selection of Additional Supplemental Materials or Resources

Despite the foregoing, educators at the School may select and use supplemental materials or resources in their classroom to augment instructional materials already selected and approved by the Chief Executive Officer(s) or the Board so long as each of the following are satisfied:

- (a) the educator has reviewed the supplemental materials or resources in their entirety prior to using them in the classroom;
- (b) the supplemental materials or resources meet the criteria set forth in this policy; and
- (c) the supplemental materials or resources have not previously been prohibited by the Chief Executive Officer(s) or the Board.

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### Contract Requirements

If the School contracts with a third party to provide online or digital materials, the School shall include in the contract a requirement that the provider give notice to the School any time that the provider makes a material change to the content of the online or digital materials, excluding regular informational updates on current events. The School shall also comply with applicable requirements in R277-469 related to School contracts with publishers for instructional materials.

### Sensitive Material Review Procedures

Sensitive materials are prohibited in the School setting. In accordance with Utah law, USBE rule, and the School's administrative procedures, stakeholders may initiate a sensitive material review by the School if they feel an instructional material used by the School constitutes sensitive material.

The Chief Executive Officer(s) shall establish administrative procedures that set forth how stakeholders may initiate a sensitive material review by the School and the review process the School will follow. The administrative procedures shall comply with applicable Utah law and USBE rule.

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## **Administrative Procedures Sensitive Material Review**

These procedures are established in accordance with the Instructional Materials Policy adopted by the School's Board of Directors.

### **Sensitive Material Review Process**

Stakeholders may initiate a sensitive material review by the School if they feel an instructional material used by the School constitutes sensitive material.

However, notwithstanding the foregoing, if a stakeholder makes three unsuccessful challenges during a given academic year, that individual may not trigger a sensitive material review during the remainder of the given school year. An "unsuccessful challenge" means an allegation that a given instructional material constitutes sensitive material that the School concludes to be erroneous, either on direct review or on appeal to the Board, resulting in the retention of the given instructional material.

Stakeholders may allege that an instructional material used by the School constitutes sensitive material by submitting the Sensitive Material Review Request Form accompanying these procedures. Upon receipt of the completed form by a stakeholder, the School shall:

#### **Step One – Initial Review**

- (a)(i) Make an initial determination as to whether the allegation presents a plausible claim that the challenged instructional material constitutes sensitive material, including whether the allegation includes excerpts and other evidence to support the allegation. The Chief Executive Officer(s) shall designate two or more School employees to make this initial determination for the School (the Chief Executive Officer(s) can be one of the two employees if he/she desires); and
- (ii) If the School's initial determination is that the allegation presents a plausible claim that the challenged instructional material constitutes sensitive material as described above, the School shall immediately remove the challenged material until the School completes the School's full review of the challenged material as set forth below;

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#### **Step Two – Objective Sensitive Material Standards Review (if necessary)**

- (b)(i) If the School's initial determination is that the allegation presents a plausible claim that the challenged instructional material constitutes sensitive material, engage in a review of the allegations and the challenged instructional material using the objective sensitive material standards. The Chief Executive Officer(s) shall designate three or more individuals to conduct this review, one of which must be a School community parent (the School employees who conducted the initial review may also be designated to conduct this review); and

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- (ii) If the School determines that the challenged instructional material constitutes objective sensitive material, the School shall ensure that the material remains inaccessible to students in any School setting;

**Step Three - Subjective Sensitive Material Standards Review (if necessary)**

- (c) If, and only if, the School determines that the challenged instructional material does not constitute objective sensitive material, the School shall:
  - (i) Review the allegations and the challenged instructional material under the subjective material standards to determine if an instructional material is subjective sensitive material. The Chief Executive Officer(s) shall designate three or more individuals to conduct this review, but at least two of the individuals must be School community parents (the individuals who conducted the objective sensitive material standards review may also be designated to conduct this review, but at least two of the individuals must be School community parents);
  - (ii) Allow student access to the challenged instructional material during the School's subjective sensitive material review if the student's parent gives consent regarding the specific challenged instructional material; and
  - (iii) If the School determines that the challenged instructional material constitutes subjective sensitive material, ensure that the material is inaccessible to students in any School setting, including the termination of the parent consent option described above.

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**Miscellaneous Review Rules**

Neither the individuals responsible for procurement of the challenged instructional materials nor the stakeholder who is challenging the instructional materials may serve on any of the review committees described in the steps above.

If the School requires a School employee to participate on a sensitive materials review committee requiring engagement outside of contract hours, the School shall compensate the employee for the employee's time participating on the committee.

**Communication**

Soon after the completion of a sensitive material review, the School shall communicate its final determination (regardless of in which step the final determination comes) in writing to the stakeholder who requested the review.

The School shall also communicate to the USBE each stakeholder sensitive material review request, the final determination by the School on each request, and the School's rationale for its final determination on each request. The Chief Executive Officer(s) shall communicate this information to the USBE on behalf of the School using the form provided by the USBE:

- (a) within 30 school days of the final determination; or

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- (b) if an appeal is in process, at the conclusion of the appeal.

#### Appeal

A stakeholder may appeal the School's decision to the Board regarding a sensitive material review by submitting to the Board President the Sensitive Material Appeal Request Form within fourteen days of receiving the School's decision. A stakeholder may file such an appeal regardless of whether the School removed or retained the challenged instructional material. The Board shall vote in a public board meeting to decide the outcome of a sensitive material review appeal. In the board meeting, the Board shall clearly identify:

- (a) the Board's rational for its decision; and
- (b) the Board's determination on each component of the statutory and any additional policy standards used by the Board to reach the Board's conclusion.

#### **Removing Instructional Materials That Constitute Sensitive Material**

##### Removing Instructional Material if State Threshold is Met

In accordance with Utah Code § 53G-10-103(7), the School shall remove instructional material from student access upon being notified by the USBE that the following number of LEAs in the state have determined that the instructional material constitutes objective sensitive material:

- (a) at least three school districts; or
- (b) at least two school districts and five charter schools.

However, removal from student access under these circumstances is subject to the USBE voting to overturn the application of the statewide removal requirement with respect to the instructional material. If the USBE votes to overturn the application of the statewide removal requirement with respect to the instructional material, the statewide removal requirement no longer applies and the School may choose to return access to the instructional material to its students.

##### Removing Instructional Material After Sensitive Material Review

The School shall follow the applicable removal requirements described in Steps One through Three of the School's sensitive material review process. In addition, if at the completion of the sensitive material review process the School makes a final determination that an instructional material constitutes sensitive material, the School shall remove the instructional material.

#### Disposal of Instructional Material

When removing instructional material because it constitutes sensitive material, the School shall:

- (a) physically remove the sensitive material from the School;
- (b) remove all access by students to the sensitive material;
- (c) communicate with the relevant vendors and publishers regarding the School's decision;
- (d) legally dispose of the sensitive material; and
- (e) not sell or distribute the sensitive material.

## **Sensitive Material Review Request Form**

### Information about Instructional Material Requested to be Reviewed:

- 1) Title:
- 2) Author:
- 3) Publisher:
- 4) School campus where this instructional material is used or can be accessed:
- 5) Do you believe this instructional material constitutes sensitive material as that term is defined in Utah Code § 53G-10-103? Yes No

### Information about Requestor:

- 1) Name:
- 2) Phone:
- 3) Address:
- 4) Email:
- 5) Are you a student of Wallace Stegner Academy? Yes No
- 6) Are you a parent of a student of Wallace Stegner Academy? Yes No
- 7) Are you an employee of Wallace Stegner Academy? Yes No
- 8) Are you a board member of Wallace Stegner Academy? Yes No

### Information about Review Request:

- 1) Was this instructional material recommended, assigned, used, or made available through the school? If so, please explain.
- 2) In your opinion, how does this instructional material constitute sensitive material? Please provide examples, page numbers, links, or other information to help in locating or identifying the content you believe qualifies as sensitive material. Please attach any images or other corroborating evidence. You may attach additional pages as needed.

Requestor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*After you submit this Form, you will receive an acknowledgment of receipt and an estimated timeline for when a decision will be made by the School. The School generally completes its review and makes its final decision between thirty to sixty (30-60) days after its receipt of a request for review.*

## Sensitive Material Appeal Request Form

### Instructions:

A requestor must submit this Form along with a copy of the School's written decision on the sensitive material review request within fourteen (14) days of receiving the School's written decision.

### Information about Requestor:

- 1) Name:
- 2) Phone:
- 3) Address:
- 4) Email:
- 5) Date you received the School's written decision on your sensitive material review request:

6) Are you a student of Wallace Stegner Academy?	Yes	No
7) Are you a parent of a student of Wallace Stegner Academy?	Yes	No
8) Are you an employee of Wallace Stegner Academy?	Yes	No
9) Are you a board member of Wallace Stegner Academy?	Yes	No

### Information about Challenged Instructional Material:

- 1) Title:
- 2) Author:
- 3) Publisher:
- 4) School campus where this instructional material is used or can be accessed:
- 5) Please provide a written statement setting forth your rationale for appealing the School's decision regarding the challenged instructional material (attach additional pages as needed).

Requestor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*After you submit this Form, you will receive an acknowledgment of receipt and an estimated timeline for when a decision will be made by the Board in a public board meeting. The Board generally tries to make its decision at a public board meeting between thirty to sixty (30-60) days after its receipt of an appeal.*

**Cash Handling Policy**  
Adopted: January 20, 2016  
Revised: 

Deleted: September 19, 2017

## Policy

Wallace Stegner Academy (the "School") adopts this policy to ensure that the School utilizes sound internal controls and properly handles cash received by School personnel.

The Chief Executive Officer(s) will designate at least two (2) School employees who are authorized to handle cash paid to the School, and only those employees may handle cash for the School. The Chief Executive Officer(s) will ensure that all employees who are authorized to handle cash receive appropriate annual training.

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All cash received by the School must be properly documented.

All cash received must be deposited no later than once every three (3) banking days. Two individuals should prepare each deposit using tamper resistant deposit bags.

The Chief Executive Officer(s) may establish additional procedures associated with the handling of cash that are not inconsistent with this policy or applicable laws and regulations.

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No School employee should handle cash associated with a non-School-sponsored activity in their capacity as a School employee. In the event such an individual does handle such cash, they must make it clear to the organization sponsoring the activity that they are not acting as a School employee.

### Use of Peer-to-Peer Payment Applications

The following requirements apply if the Chief Executive Officer(s) elects to use any peer-to-peer payment application, including but not limited to Venmo, Cash App, PayPal, or Apple Pay (a "P2P Account"):

1. Any P2P Account used for School business must be established under the School's name and EIN. No P2P Account established under any individual or other third party's name may be used for School business.
2. Any School P2P Account must be linked to the School's bank account and may not be linked to any individual or other third party's bank account.
3. Any School P2P Account may only be used to receive funds from third parties and may not be used to make any payment or otherwise transfer funds to any person or entity other than the School.

4. Any funds received in a School P2P Account may only be transferred to the School's bank account and should be transferred as soon as reasonably possible.
5. School P2P Account transactions must be reconciled at least monthly.
6. All School P2P Account transactions must be documented in the School's financial records in accordance with applicable accounting procedures.
7. As with other School financial transactions, the Chief Executive Officer(s) must identify specific individuals with specific responsibilities for managing the School P2P Account and must ensure adequate separation of duties and internal controls.

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## Credit Card Policy

Adopted: October 18, 2016

Amended: May 20, 2021

Amended: March 14, 2022

Amended: December 17, 2025

### Purpose

The purpose of this policy is to authorize the Chief Executive Officer(s) to obtain credit cards for employees of Wallace Stegner Academy (the "School") and to establish procedures for use of credit cards to make purchases for the School.

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### Policy

#### Credit Card Account

Academica West has established a corporate credit card account under which the School can have individual credit cards issued for authorized School employees.

The School will be billed monthly for charges associated with purchases made with cards issued to School employees. The School will be responsible for full payment of all such charges each month and will reimburse Academica West for any costs associated with unpaid charges from purchases by School employees.

The total credit limit for each card issued to School employees will be up to \$60,000.

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#### Procedures for Issuing Cards

The Chief Executive Officer(s) will be issued a credit card and may authorize other School employees to receive credit cards. The Chief Executive Officer(s) will coordinate the issuance of credit cards to School employees with Academica West.

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The Chief Executive Officer(s) will ensure that all employees to whom cards are issued are aware of and receive appropriate training regarding the policies and procedures applicable to their use of the card.

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#### Procedures for Making Purchases

School credit cards issued to School employees under this policy may only be used for legitimate business purposes. School credit cards may not be used for cash advances or ATM transactions for any reason. School credit cards may not be used for the purchase of alcohol. School credit cards are not intended for purchases that can otherwise be paid for by check using standard payment methods, including purchases from vendors that do not accept checks, purchases during travel, or emergency purchases.

The person to whom a School credit card is issued and whose name is on the card (the "cardholder") is solely responsible for all purchases on the card and for ensuring that the credit card number is not used by unauthorized personnel. As such, the cardholder shall not share their card number with anyone. In addition, the credit card should not be stored in an online account that anyone other than the cardholder has access to.

All purchases with a School credit card must be authorized in accordance with the School's Purchasing and Disbursement Policy and must comply with all applicable procurement requirements. Documentation of purchase approvals will be retained.

The cardholder is responsible for receiving, printing and retaining all receipts related to purchases made with the School credit card. The cardholder shall label all receipts with a description of what it is for to ensure proper coding. All receipts must be submitted to Academica West within one week of the closing date of the account statement.

Upon the termination of a cardholder's employment for any reason, their School credit card must be cancelled immediately and returned to the Chief Executive Officer(s).

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All purchases made with School credit cards will be reconciled by Academica West monthly in order to ensure that all receipts are present and that all purchases have been made in accordance with School policies.

Violation of policies and procedures regarding use of School credit cards, including not retaining documentation of purchases or making personal purchases, may result in card cancellation, disciplinary action, or criminal prosecution. If the School disputes a purchase made with the School credit card, the School may dispute the charge and may hold the cardholder responsible for the charge.

The Chief Executive Officer(s) and Academica West will develop an internal review plan to periodically select School credit card statements to verify that School policies and procedures are being followed and that purchases are appropriate, documented, and coded to the proper funding sources.

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If a School credit card is lost or stolen, the cardholder must immediately contact the Chief Executive Officer(s), and the Chief Executive Officer(s) will notify Academica West to have the card cancelled.

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**Wallace Stegner Academy**  
**Policy: Hotline Complaint Policy**  
**Adopted:**



**Purpose**

The purpose of this policy is to outline, in accordance with Utah Administrative Code R277-123-7, how Wallace Stegner Academy (the “School”) responds to and resolves Utah State Board of Education (“USBE”) public education hotline complaints received as referrals from the USBE Internal Audit Department.

**Policy**

After the School receives a hotline complaint, if contact information for the complainant is available, designated School personnel will contact the complainant promptly and document (a) the School personnel that contacted the complainant; (b) the type of contact made (phone, email, etc.); (c) the date of the contact; and (d) the resolution of the concern or action steps to be taken.

The School will make at least two good faith attempts to contact a complainant when contact information is available.

The School will investigate, respond to, and attempt to resolve hotline complaints in accordance with the requirements set forth in R277-123-7 and School policy. If the School determines that a hotline complaint should have been addressed by way of the School’s applicable grievance policy, the School may inform the USBE Internal Audit Department. To the extent allowed by R277-123 and applicable law, complainants should not use the hotline to bypass the School’s grievance policies.