



Governing Board Meeting

Date: January 15, 2026

Time: 7:00 PM

Location: Junior High – Building 2; 1228 West 2185 South, Woods Cross, UT 84087

Online Access: <https://us02web.zoom.us/j/89222532473>

Mission Statement

Legacy Preparatory Academy will cultivate intellectual and moral virtue according to classically based pillars of truth, goodness, and beauty.

AGENDA

OPEN MEETING: ROLL CALL AND WELCOME

PUBLIC COMMENT (Limited to three minutes each)

CONSENT ITEMS

- October 23, 2025 Board Meeting and Closed Session Minutes
- New Hires

COMMITTEE REPORTS

- Executive Committee
- Academic Excellence
- Communication Committee
- Finance/Audit Committee
- Policy and Governance Committee
- Committee Assignments

REPORTS

- Director's Report
- Financial Report
 - Audit Presentation & Training

VOTING AND DISCUSSION ITEMS

- LEA Specific License
- Policies:
 - Amended Instructional Materials Policy
 - Amended Paid Parental and Postpartum Recovery Leave Policy
 - Amended Student Conduct and Discipline
 - Amended Fee Waiver

CLOSED SESSION (This closed meeting may take place at the beginning and/or conclusion of the meeting): To discuss character, professional competence, physical or mental health of an individual

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



(employee or student), and any of the following topics, if necessary: strategy sessions to discuss the purchase, exchange, lease or sale of real property; collective bargaining; or pending litigation, or other matters appropriate pursuant to statute(s).

CALENDARING

- Next Board Meeting March 12, 2026

ADJOURN

LPA Governing Board:

2026: Alisha Johnson (Treasurer), David Ray (Member), Sandy McCleve (Member), Aimee Hinojosa (Secretary)

2027: John Cook (Board Chair), Lee Peterson (Member)

2028: Lara Murphy (Vice Chair)

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EXECUTIVE SUMMARY

NEW HIRES

Filling a vacant position

April Becksted- Paraprofessional
Alyssa Garcia- Paraprofessional
Sherrell Jeli- Paraprofessional
Max Paredes- SpEd Paraprofessional
Lexie Whitman- Paraprofessional
Ashley Ramsey- Long Term Substitute

Filling a new position

Matt Messick- Facilities Manager

Action: Board vote

DIRECTORS REPORT

See board meeting documentation folder for the most up to date report.

Action: No action needed

FINANCIAL REPORT

See board meeting documentation folder for the most up to date report.

Action: No action needed

AUDIT PRESENTATION & TRAINING

Eide Bailly has completed the annual independent audit of the School's financial statements and compliance for the fiscal year ending June 30. Their audit was conducted in accordance with required standards, and they found that the financial statements fairly represent the School's financial position and activity. They met with the Board to review the audit results, including the financial statements, compliance testing, and this year's required communications.

Action: No action needed

LEA SPECIFIC LICENSES

The license areas, and endorsements shall be valid for three (3) academic years as indicated on the attached spreadsheet which contains the associated educator information and rationale for the request. All LEA-Specific licenses will expire on June 30th of the final academic year approved. The LPA Board of Directors additionally acknowledges that LEA-Specific educator licenses, license areas, or endorsements may be renewed by the Utah State Board of Education (USBE). These renewals will be approved or denied on a case-by-case basis.

Action: Board vote

POLICIES

Amended 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.

Action: Board vote

Amended Paid Parental and Postpartum Recovery Leave Policy

This policy is being revised to clarify that the maximum paid postpartum recovery leave period is 15 contract days and the maximum paid parental leave period is 3 calendar weeks. 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.

Action: Board vote

Amended Student Conduct and Discipline

SB 170 from the 2025 legislative session and corresponding revisions to USBE rule R277-608 (effective November 2025) brought about changes to the rules and requirements related to the use of emergency safety interventions (physical restraint and seclusion) with students. These new rules and requirements have been built into the Student Conduct and Discipline Policy. Other updates and clarifications have also been added to the policy to increase its compliance with new and existing laws and updates to USBE rules, including those related to due process for student disciplinary actions, reinstatement of students after suspension, reintegration plans, administrative student conduct and discipline plans (plan requirements have decreased), corporal punishment, and state reporting requirements for suspensions and expulsions.

Action: Board vote

Amended Fee Waiver Policy

HB 344 from the 2025 legislative session separates out courses for school fee charging purposes into “non-fee courses” (ELA, health education, math, science, and social studies) and “fee courses” (all courses that are not non-fee courses) This new law restricts what types of fees can be charged for such courses. It also specifies that beginning with the 26-27 school year, schools that have secondary students (students in grades 7-12) and award them credit toward graduation must provide at least one option for each graduation credit requirement that does not require the payment or waiver of a fee. However, there is an exception for charter schools that only offer the following for a given graduation requirement: an AP, IB, or CE course. HB 344 also extends the annual deadline by which schools must approve their fee schedules for the following school year, changing it from April 1 to June 1. The changes from HB 344 and R277-407 (which was last revised in December 2025) have been worked into the school’s Fee Waiver Policy.

Action: Board vote



Governing Board Meeting

Date: October 23, 2025

Location: Junior High – Building 2; 1228 West 2185 South, Woods Cross, UT 84087

Online Access: <https://us02web.zoom.us/j/89222532473>

In Attendance: John Cook, Lara Murphy, Alisha Johnson, David Ray, Sandy McCleve, Aimee Hinojosa, Lee Peterson

Others In Attendance: Brandie Evans, Kim McVey, Platte Nielson, Krystal Taylor

MINUTES

OPEN MEETING: ROLL CALL AND WELCOME

John Cook called the meeting to order at 7:02PM.

PUBLIC COMMENT (Limited to three minutes each)

There were no public comments.

CONSENT ITEMS

- August 21, 2025 Board Meeting and Closed Session Minutes
- September 29, 2025 Board Meeting Minutes

Alisha Johnson made a motion to approve the August 21, 2025 board meeting and closed session minutes and the September 29, 2025 board meeting minutes. Lee Peterson seconded. Motion passed unanimously. Votes were as follows: John Cook, Aye; Lara Murphy, Aye; Alisha Johnson, Aye; David Ray, Aye; Sandy McCleve, Aye; Aimee Hinojosa, Aye; Lee Peterson, Aye.

- New Hires
No new hires at this time.

COMMITTEE REPORTS

- Committee Assignments
- Policy and Governance Committee
- School Safety Committee

The Board reviewed all existing committee assignments to determine which committees were still necessary and made adjustments to reflect recent changes in board membership. Updates were made to ensure balanced participation and continued oversight in key areas. The Policy Governance Committee, in particular, has been hard at work refining policies.

REPORTS

- Director's Report
Brandie Evans shared an update on Legacy Prep's ongoing strategic initiatives, including efforts to strengthen school culture, improve academic outcomes, and enhance staff and family engagement. Highlights included a successful start to the school year with strong student engagement, staff professional development, and leadership growth through initiatives like the Legacy Leadership Lab. Academic, athletic, and fine arts achievements were also celebrated, reflecting the school's continued focus on excellence and character education.
- Financial Report



Alisha Johnson reviewed the September month-end report showed revenues and expenses tracking appropriately at roughly 25% through the fiscal year. Local revenues were higher due to beginning-of-year fees and grant reimbursements, while certain expenses such as property services and technology purchases were elevated due to timing and start-of-year projects. The school maintains a strong financial position with 215 days cash on hand and a debt service ratio of 1.87, exceeding bond covenant requirements. Enrollment remains steady, with minor fluctuations.

VOTING AND DISCUSSION ITEMS

- Policies:
 - Amended Bullying and Hazing Policy
 - Amended Child Abuse and Neglect Reporting Policy
 - Amended Electronic Resources Policy
 - Amended Kindergarten Toilet Training Policy
 - Amended Lottery and Enrollment Policy
 - Amended Facilities Rental Policy
 - Hotline Complaint Policy
 - Parent Classroom Observation Policy
 - Video Surveillance Policy
 - Weapons on School Property Policy

Platte Nielson outlined changes made with the above policies. The Bullying and Hazing Policy was revised to align with SB 223 and updated state rules, incorporating new definitions and training requirements. A new Hotline Complaint Policy was adopted in compliance with R277-123, outlining procedures for responding to hotline reports. Board members have all completed required training, and the school website has been updated to meet new policy requirements. The classroom observation policy was discussed and adjusted to add in additional clarity.

David Ray made a motion to approve the above listed policies, with the changes as discussed to the classroom observation policy. Lee Peterson seconded. Motion passed unanimously. Votes were as follows: John Cook, Aye; Lara Murphy, Aye; Alisha Johnson, Aye; David Ray, Aye; Sandy McCleve, Aye; Aimee Hinojosa, Aye; Lee Peterson, Aye.

CALENDARING

- Next Board Meeting January 15, 2026

CLOSED SESSION (This closed meeting may take place at the beginning and/or conclusion of the meeting): To discuss character, professional competence, physical or mental health of an individual (employee or student), and any of the following topics, if necessary: strategy sessions to discuss the purchase, exchange, lease or sale of real property; collective bargaining; or pending litigation, or other matters appropriate pursuant to statute(s).

At 8:32 PM Alisha Johnson made a motion to move into closed session for the above listed reasonings located at Legacy Preparatory Academy. Aimee Hinojosa seconded. Votes were as follows: John Cook, Aye; Lara Murphy, Aye; Alisha Johnson, Aye; David Ray, Aye; Sandy McCleve, Aye; Aimee Hinojosa, Aye; Lee Peterson, Aye. Motion passed unanimously.

ADJOURN



At 9:18PM Aimee Hinojosa made a motion to come out of closed session and adjourn. Alisha Johnson seconded. Motion passed unanimously. Votes were as follows: John Cook, Aye; Lara Murphy, Aye; Alisha Johnson, Aye; David Ray, Aye; Sandy McCleve, Aye; Aimee Hinojosa, Aye; Lee Peterson, Aye.

Board of Directors Closed Session Statement

Date: October 23, 2025

Location: 1228 West 2185 South, Woods Cross, UT 84087

CLOSED SESSION SWORN STATEMENT:

At a duly noticed public meeting held on the date listed above, the board of directors for Legacy Preparatory Academy entered into a closed session for the sole purpose of discussing the character, professional competence, or physical or mental health of an individual and to discuss deployment of security personnel, devices, or systems 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 23rd day of October, 2025.



Directors Report | January 2026

Building 2 - Board Room | Thursday, January 15, 2026 | 7:00 pm

MISSION

Legacy Preparatory Academy will cultivate intellectual and moral virtue according to the classically based pillars of truth, goodness, and beauty.

VISION

Legacy Preparatory Academy is committed to providing a culture where students become productive and valuable members of their communities and world. We believe high expectations, hard work, and enthusiasm are essential to achieving academic excellence and good character. These values instilled at Legacy Prep and research-proven curricula give our students the confidence to achieve anything!

MOTTO

Learning the Past. Creating the Future.

LEGACY PAIDEIA

I am a Classical Student.
I am Curious to Learn.
I pursue Intellectual and Moral Virtue.
I am a citizen of my Community.
I Build the Foundation for an Abundant Life by Lifting Others.
I am Governed by Nobility.
I act with Honor and Integrity.
I am an individual with Great Fortitude.
I am Resilient and Courageous.
I am Temperate.
I exhibit Discipline and Self-Control.
I am developing Practical Wisdom.
I make Good Judgments.
I am Selfless in my Fight for Justice.
I demand Equity and promote Civility.

I AM A LEGACY LEADER

LEGACY PREPARATORY ACADEMY

Building 1 – Elementary (K-6)

2214 South 1250 West
Woods Cross, Utah 84087
E: elementary@legacyprep.org

Building 2- Junior High (7-9)

1228 West 2185 South
Woods Cross, Utah 84087
E: juniorhigh@legacyprep.org

Phone: 801-294-2801

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IMPORTANT DATES!

JANUARY 2026

1/6-1/23: Student Re-enrollment period
1/16: 5th Grade Maturation
1/19: NO SCHOOL- Civil Rights Days
1/23: 2nd Grade Asia Day
1/23: 4th Grade Treasure Island Day
1/26: BHS Sophomore Orientation
1/29: Utah Charter Day on the Hill
1/30: WXHS Sophomore Orientation

FEBRUARY 2026

2/6: 1st Grade Mexican Fiesta
2/6: 3rd Grade Science Day
2/16-2/20: February Break
2/24: Spelling bee (Grades 3-9)
2/27: 5th Grade JA Boz Town

MARCH 2026

3/3: Pop Into a Good Book
3/4: Guitar/Choir Concert
3/5: Band/Orchestra Solo Ensemble Performances
3/6: Junior High Spring Stomp
3/13: NO SCHOOL (Professional Development Day)
3/16-3/20: Scholastic Book Fair
3/18-3/20: Spring Conferences
3/23-3/27: Spirit Week
3/30-4/3: Spring Break

STRATEGIC PLANNING PROGRESS

o AREAS OF FOCUS FOR THE 2025/2026 SCHOOL YEAR

Earlier this week, the administrative team conducted a comprehensive review of academic performance, climate, attendance, behavior, and stakeholder feedback. This analysis informed a set of equity-centered priorities that were translated into actionable goals with defined benchmarks, owners, and monitoring structures. Monthly data reviews are in place to ensure responsive adjustments throughout the year.

GOAL 1: Build A Strong, Positive School Culture

Progress to Date: Legacy Prep has taken foundational steps toward strengthening a consistent, schoolwide culture anchored in PBIS and student support systems. Baseline data revealed Tier 1 and Tier 2 TFI scores at 51% and 50%, respectively, alongside elevated chronic absenteeism (24%) and student feedback indicating concerns around fairness and rule-following

In response:

- Tier 1 PBIS structures have been prioritized, with scheduled monthly Tier 1 PBIS team meetings and clearly defined expectations.
- Planning is underway to conduct TFI assessments twice annually, with a targeted increase of at least 5% in Tier 1 and Tier 2 fidelity by EOY.
- Teachers are being supported in developing Tier 1 classroom management plans, ensuring consistency across learning environments.
- Tier 2 SEB plans are being refined with a goal of 60% fidelity of implementation, addressing the approximately 10% of students requiring targeted behavioral supports.

Early Indicators

- Projected Tier 1 TFI improvement to 56% and Tier 2 growth in both elementary and secondary settings by EOY.
- CREW structures are being developed at the secondary level to directly address student self-efficacy and belonging.

Next Steps

- Strengthen staff training on Tier 1+ practices.
- Monitor chronic absenteeism alongside behavior and SEL data monthly to ensure alignment between systems and outcomes.

GOAL 2: Improved Academic Achievement

Progress to Date: Academic data analysis identified uneven ELA proficiency across grades and a need for stronger instructional coherence, particularly around intervention, DOK alignment, and formative assessment use

Key actions underway include:

- Professional learning focused on formative data interpretation, academic language, and literacy strategies across content areas.
- Required updates to 180-day learning plans to include standards, success criteria, and assessment alignment.
- Literacy walkthroughs implemented to observe instructional rigor and provide targeted feedback.

Notable Data Trends

- Acadience Reading outcomes show strong momentum:
 - o Kindergarten exceeded expectations, reaching 96% EOY proficiency.
 - o Grades 1–5 largely met or exceeded growth targets, with most grades demonstrating BOY-to-EOY gains.
- Secondary benchmarks show promising trends:
 - o Grade 8 increased from 36% to 46% on Track My Progress.
 - o Grade 9 CommonLit proficiency increased from 52% to 62%.

Focus Areas Moving Forward

- Reducing the number of students below benchmark in Grade 6 by at least 5 students.
- Ensuring 30% of students in red MOY pathways move to yellow or higher by EOY.
- Maintaining 80% average active engagement across K–9 classrooms.

GOAL 3: Strengthen Communication Systems and Information Flow (REVISED FOCUS)

Rationale for Change: During the review process, administration agreed that while recruitment and retention remain important long-term outcomes, the most immediate and impactful lever is improving communication channels. Feedback from families and staff indicated that inconsistent, unclear, or fragmented communication contributes to frustration for current families and creates barriers for prospective families. By strengthening communication systems now, Legacy Prep will:

- Improve access, clarity, and timeliness of information for current students and families
- Establish scalable systems that will support future recruitment and enrollment efforts
- Reduce preventable confusion related to enrollment timelines, events, and academic expectations

Revised Goal Statement: Legacy Prep will strengthen and streamline school-wide communication systems to ensure timely, accurate, and accessible information for families, staff, and future stakeholders.

Key Action Steps (Updated)

- Establish and train staff on clear communication standards for all stakeholders.
- Review and update the school website monthly to ensure compliance and accurate, user-friendly information.
- Launch and promote a school app to centralize communication and increase family engagement.
- Develop consistent messaging structures for academic updates, events, and school-wide initiatives.
- Implement a monthly stakeholder feedback tool to assess clarity, effectiveness, and responsiveness of communications.

Progress Indicators

- Website compliance maintained with monthly updates.
- Target of 60% or more family engagement through the school app.
- Increased clarity and satisfaction as measured through stakeholder feedback tools.
- Reduced repeat inquiries and improved alignment between internal and external messaging.

Looking Ahead

While recruitment and retention metrics will continue to be monitored, the primary emphasis for 2025-2026 will be on building a strong communication infrastructure that supports both current and future families.

GOAL 4: Foster A Positive and Engaged Staff Culture

Goal 4 remains under active review as the leadership team refines its scope to ensure clarity, focus, and alignment with Legacy Prep's mission. The team is considering dividing this goal into two complementary sub-focus areas to better reflect the distinct—but interconnected—needs of staff culture.

The emerging structure would center on:

A. Professional Growth and Instructional Excellence

- Align all professional development to school-wide priorities and 180-day goals.
- Ensure professional learning is coherent, job-embedded, and tied to student outcomes.
- Clarify expectations for instructional growth, leadership development, and continuous improvement.

B. Staff Wellness, Engagement, and Resilience

- Strengthen systems that support staff well-being, sustainability, and morale.
- Create intentional structures for recognition, voice, and belonging.
- Use staff feedback data to guide leadership decisions and improve working conditions.

As we continue to emphasize culture as a foundational driver of student success, the administration is committed to ensuring that staff culture goals are:

- Mission-aligned
- Clearly defined
- Balanced between performance and well-being
- Actionable and measurable

Final benchmarks and action steps for Goal 4 will be established following additional staff input and leadership review.

LEGAL AND ETHICAL COMPLIANCE

- **S&P GLOBAL RATINGS- CREDIT UPDATE (DECEMBER 2025)**

S&P Global Ratings affirmed its 'BBB-' long-term rating with a Stable Outlook on Legacy Preparatory Academy's outstanding charter school revenue bonds. This affirmation reflects S&P's view of the school's consistent enrollment demand, strong liquidity, and sustained positive operating performance, which together support stable debt service capacity.

Key credit strengths highlighted by S&P include:

- Strong liquidity, with approximately 209 days' cash on hand and unrestricted reserves of \$5.7 million, representing 26% of total debt.
- Consistently positive operating results, including a fiscal 2025 operating margin of just over 10% and lease-adjusted maximum annual debt service (MADS) coverage of approximately 1.9x, well above the required 1.05x covenant.
- Stable enrollment and demand, with fall 2025 enrollment of 1,005 students and capacity for future growth under the charter.
- Experienced governance and management, including a long operating history, successful execution of a major facility expansion completed on time and within budget, and a favorable relationship with the charter authorizer under Utah's evergreen charter framework.

These strengths are partially offset by:

- A moderately high debt burden, with approximately \$22.0 million in outstanding long-term debt and elevated debt-to-capitalization ratios typical of charter schools.
- Ongoing sector-related risk, as charter schools remain subject to potential closure for academic or financial nonperformance, though S&P views this risk as mitigated by Legacy's track record.

The Stable Outlook reflects S&P's expectation that Legacy will maintain enrollment near current levels, continue generating operating surpluses, and preserve liquidity and debt service coverage metrics at or above current levels. A downgrade could occur if enrollment or liquidity declines materially, or if additional debt significantly increases leverage. Conversely, upward rating pressure could develop over time if demand metrics strengthen and financial performance aligns with higher-rated peers.

- **COGNIA ACCREDITATION ENGAGEMENT REVIEW (2025/2026)**

Legacy Preparatory Academy demonstrates a strong, mission-driven culture with effective leadership and positive student outcomes. Focused attention on data use, junior high engagement, and systematic program evaluation will strengthen instructional impact and sustain accreditation excellence.

Accreditation Status: Accredited

Index of Education Quality (IEQ): 296 (Cognia Network Avg: 297)

Status reflects strong institutional practices with targeted areas for continued improvement

Key Commendations (Strengths)

Culture & Mission Alignment

- Strong, schoolwide alignment to the Paideia mission (truth, goodness, beauty).
- Students, families, staff, and board members demonstrate shared understanding of values.
- Well-established PBIS, SEL, and student support systems promote belonging and well-being.
- High levels of trust, collaboration, and professional collegiality.

Leadership & Professional Culture

- Effective recruitment, onboarding, mentoring, and retention of mission-aligned staff.
- Annual Administrative 180 Plan uses stakeholder data to set priorities.
- Teachers report strong support, shared purpose, and collective responsibility for student success.
- Governance remains mission-focused and collaborative.

Instructional Engagement & Student Growth

- Elementary engagement is very strong (90–94% observed engagement).
- Early literacy growth exceeds state averages.
- Students participate in goal-setting and student-led conferences.
- Inclusive instructional practices support diverse learners.

Priority Areas for Improvement (Board Monitoring Focus)

1. Data-Informed Instruction

Need: More structured time and targeted professional learning for teachers to analyze student data and design differentiated instruction.

Why it Matters: Strong data systems exist, but instructional adjustments are not consistently driven by analysis.

2. Junior High Student Engagement

Need: Greater consistency in learner-centered practices, student voice, and responsibility for learning in junior high.

Why it Matters: Engagement indicators declined during the year, signaling the need for sustained instructional focus.

3. Program Evaluation & Decision-Making

Need: A documented, systematic process for leaders to evaluate instructional programs and organizational effectiveness using multiple data sources.

Why it Matters: Strengthens continuous improvement and ensures resources align with student needs.

Recommended Board-Level Actions

- **Monitor progress** on Cognia Areas for Improvement through Academic Excellence Committee updates.
- **Support leadership** in protecting time and resources for teacher data analysis and professional learning.
- **Deepen board engagement** with student performance trends and program effectiveness.
- **Celebrate strengths** while reinforcing accountability for continuous improvement.

- **COMPLIANCE AND REPORTING UPDATE**

From October-December, the administrative team ensured that Legacy Prep remained in full compliance with state and federal requirements through timely submission and certification of all required reports, grants, and program assurances.

Key submissions included:

- LEA Title IX Website Requirements
- LEA Educational Technology Platform Data Collection
- Emergency Safety Interventions Data Reporting
- School Land Trust Website Posting Requirements
- Sex Education Curriculum Review
- Dropout Prevention and Recovery Survey
- Change Management Cohort
- Annual Privacy Practices Benchmarks
- Desktop Monitoring Instruments (DMI)

The following grants were reviewed and submitted in Utah Grants

- School Safety and Security Specialist Stipend Grant
- Title I
- TSSA
- Title IIA
- Desktop Monitoring Instruments (DMI)

RECRUITMENT AND RETENTION

- **2026/2027 Current Student Intent to Return**

Enrollment for the 2026–2027 school year at Legacy Preparatory Academy is now officially open!

- New Student Enrollment
 - Application opens: November 3, 2025
 - Registration period ends: January 23, 2026
 - First lottery draw: January 26, 2026.
 - *After the first lottery, applications will continue to be accepted and spaces filled as they become available.*
- Current Student Intent to Return
 - Current Legacy Prep families must complete the Intent to Return process in order to secure their student's spot for the 2026/2027 school year.
 - Intent to Return window: January 6–23, 2026

- **2025/2026 Student Enrollment Information**

- We have 944 students currently enrolled at LPA
- 2025/2026 October 1 Count: 960

REGISTERED: spot selected in Lotterease, accounted created in Aspire, missing required documents.
NOT INCLUDED IN THE ENROLLMENT TOTALS

NOT REGISTERED: previously registered students who have not completed re-enrollment within Aspire.
INCLUDED IN THE ENROLLMENT TOTALS



REGISTERED: spot selected in Lotteree, NOT INCLUDED IN THE ENROLLMENT TOTAL

NOT REGISTERED: previously registered, INCLUDED IN THE ENROLLMENT TOTAL

2025/2026 Student Retention

Data pulled directly from Aspire

Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Class Capacity	28	28	28	28	30	30	30				
Grade Level Capacity	112	112	112	112	120	120	120	131	131	130	1200
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	101	98	105	114	92	102	114	115	78	84	1003
Withdrawn	0	0	0	0	0	0	0	0	0	0	0
Registered	3	1	0	2	1	0	0	1	0	0	8
Students Not Yet Registered	0	1	1	1	1	1	1	0	1	0	7
Effective 08/01/2025											-
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	100	89	102	112	88	100	109	112	72	75	959
Withdrawn	4	4	1	2	3	2	5	4	3	9	37
Registered	0	0	0	1	0	0	0	0	0	0	1
Students Not Yet Registered	0	0	0	0	1	0	0	0	1	0	2
Effective 9/1/2025											-44
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	102	91	102	114	87	99	108	111	71	74	959
Withdrawn	4	3	2	3	3	3	6	5	4	10	43
Registered	0	0	0	1	0	0	1	0	0	0	2
Students Not Yet Registered	0	0	0	1	0	0	0	0	1	0	2
Effective 9/15/2025											-
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	102	91	102	114	87	99	109	111	71	74	960
Withdrawn	5	3	2	6	3	3	6	5	5	10	48
Registered	0	0	0	1	0	0	1	0	0	0	2
Students Not Yet Registered	0	0	0	1	0	0	0	0	1	0	0
Effective 10/1/2025											1
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	98	91	102	112	87	96	109	110	72	74	951
Withdrawn	8	3	2	6	3	6	6	6	4	10	54
Registered	0	0	0	0	0	0	0	0	0	0	0
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 10/15/2025											-9
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	99	91	102	112	87	96	108	110	71	74	950
Withdrawn	8	3	2	6	3	6	7	6	5	10	56
Registered	0	0	0	0	0	0	0	0	0	1	1
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 11/1/2025											-1
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	96	90	102	112	87	95	106	110	70	73	941
Withdrawn	11	4	2	6	3	7	9	6	6	11	65
Registered	0	0	0	0	0	0	0	1	0	1	2
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 11/15/2025											-9
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	96	90	103	112	87	95	106	110	71	73	943
Withdrawn	11	4	2	6	3	7	9	7	6	11	66
Registered	0	0	0	0	0	0	0	0	0	2	2
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 12/01/2025											2
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	95	89	103	112	87	95	106	109	70	73	939
Withdrawn	12	5	2	6	3	7	9	8	7	12	71
Registered	0	0	0	0	0	0	0	0	0	1	1
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 12/15/2025											-4
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	94	90	103	112	87	94	106	110	70	75	941
Withdrawn	13	5	2	6	3	8	9	7	7	11	71
Registered	0	0	0	0	0	0	0	0	0	0	0
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 01/01/2026											2
Grade	K	1	2	3	4	5	6	7	8	9	TOTAL
Active	97	90	103	111	87	94	105	110	71	76	944
Withdrawn	13	5	2	7	3	8	10	7	7	11	73
Registered	0	0	0	0	1	1	0	0	0	0	2
Students Not Yet Registered	0	0	0	0	0	0	0	0	0	0	0
Effective 01/15/2026											2

STAFF PROFESSIONAL DEVELOPMENT

- **NOVEMBER PROFESSIONAL DEVELOPMENT TRAINING**

November's PD Day operationalized Legacy Prep's strategic vision by strengthening instructional coherence and data use, reinforcing consistent culture and behavior systems, improving clarity and consistency in communication, and building collective efficacy and professional trust

Purpose and Structure

- The PD day balanced compliance, collaboration, and capacity-building. Staff engaged in:
- Individual and team-based IDP (Individual Development Plan) reflection
- Cross-grade and cross-content Collaborative Team Meetings (CTMs)
- Data analysis using Panorama, RISE, Acadience, and internal dashboards
- Preparation for Student-Led Conferences, strengthening family communication
- Schoolwide recognition of progress through Legacy Wins

Alignment to Strategic Goals

- **Goal 1: Build a Strong, Positive School Culture**

The PD day reinforced Tier 1 PBIS systems and relational practices. Staff revisited school norms, analyzed SEL and behavior data, and shared effective classroom management strategies. Data shared during "Legacy Wins" demonstrated early positive trends, including improved student engagement, increased positive behavior recognition, and gains in student perceptions of fairness and support. These efforts directly support increased fidelity in Tier 1 and Tier 2 PBIS implementation.

- **Goal 2: Improve Academic Achievement**

Academic improvement was a central focus throughout the day. Teachers used IDP CTMs to evaluate the impact of instructional, management, and literacy goals on student outcomes and to refine goals based on evidence. Cross-disciplinary collaboration highlighted consistent literacy strategies, formative assessment use, and increased student engagement. End-of-level data reviews supported targeted interventions, while Student-Led Conference preparation strengthened student ownership of learning and academic goal-setting.

- **Goal 3: Strengthen Communication Systems (Revised Goal)**

The PD day modeled strong internal communication practices aligned to the revised focus of Goal 3. Staff received clear policy and procedure updates, practiced consistent documentation protocols, and prepared for Student-Led Conferences—ensuring families receive clear, timely, and meaningful information about student progress. These structures improve current family experience while laying the groundwork for more effective future outreach.

- **Goal 4: Foster a Positive and Engaged Staff Culture (Under Review)**

Although Goal 4 remains under refinement, the PD strongly reflected both emerging focus areas: professional growth and staff wellness. Dedicated time for collaboration, reflection, and recognition supported collective efficacy, while intentional practices such as circle-ups and celebrations reinforced trust, morale, and mission alignment.



- **LEADERSHIP COHORT PROGRESS UPDATE**

The Leadership Cohort's work with Vincent and Aspen has meaningfully strengthened the administrative team's capacity to lead through data and systems thinking. Through structured data reviews and facilitated conversations, the team deepened its understanding of the academic, instructional, and engagement trends shaping Legacy Prep's current reality.

As a result of this work:

- Leadership engaged in cross-domain data analysis (academics, engagement, instruction), allowing the team to identify high-leverage areas for improvement.
- Insights from these sessions directly informed goal refinement, ensuring priorities are tightly aligned to evidence rather than assumptions.
- The cohort used findings to strengthen 180-day plans, improving clarity around outcomes, monitoring, and instructional expectations.
- Leadership applied learning to the design and focus of PLCs, increasing alignment, responsiveness, and coherence across grade levels and departments.

This work has moved the team beyond compliance-based data review to strategic, action-oriented use of data that drives decision-making and professional learning.

The administrative team has demonstrated strong ownership of this process, embracing new systems and using data as a catalyst for growth. This collective commitment has resulted in:

- Increased clarity around instructional rigor and expectations
- Greater alignment between leadership actions and classroom practice
- A shared language for discussing student performance and instructional quality

- **LEGACY LEADERSHIP LAB PROGRESS UPDATE**

Legacy Prep successfully launched the Legacy Leadership Lab, expanding leadership development opportunities beyond formal administrative roles and into classrooms, teams, and the broader school community.

Through the Leadership Lab:

- Staff are engaging in collaborative learning and leadership skill-building, focused on real school-based challenges.
- Participants are sharing best practices and reflecting on their impact, strengthening collective efficacy.
- The structure supports both professional growth and personal leadership development, reinforcing a culture where leadership is distributed and nurtured.

Early implementation has established:

- Clear pathways for staff to lead without leaving the classroom
- Increased engagement and ownership among participants
- A stronger pipeline for future instructional and organizational leadership

As the program continues, the Leadership Lab will serve as a key driver in building internal capacity, sustaining culture, and supporting long-term school improvement.

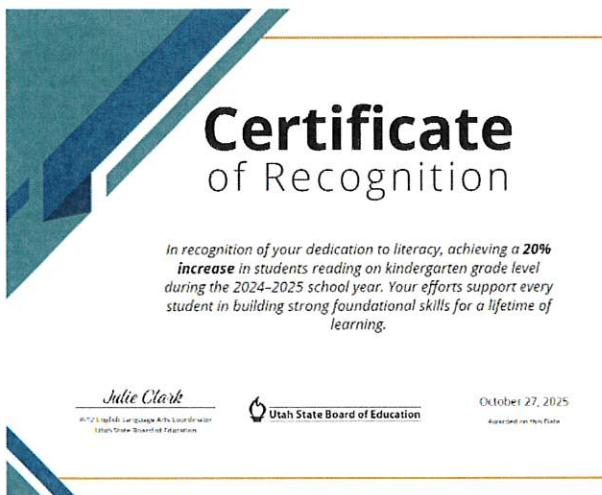
Together, the Leadership Cohort and Legacy Leadership Lab represent a cohesive, intentional approach to leadership development at Legacy Prep. By grounding leadership growth in data, collaboration, and mission alignment, the school is building the capacity needed to sustain academic rigor, strengthen culture, and ensure continuous improvement for years to come.

STUDENT ACTIVITIES AND ACHIEVEMENT (ACADEMIC EXCELLENCE)

Legacy Prep has continued the school year with purpose and momentum. Students are already demonstrating strong engagement and achievement across academics and co-curricular programs, setting a positive trajectory for continued excellence in learning, leadership, and enrichment throughout the year.

- **ACADEMIC EXCELLENCE**

During the 2024–2025 school year, Legacy Preparatory Academy was formally recognized by the Utah State Board of Education for exceptional growth in early literacy. The school achieved a 20% increase in kindergarten students reading on grade level and a 10% increase in third-grade students reading on grade level from the beginning to the end of the year. This recognition reflects the strength of our structured literacy approach, high-quality instruction, and the unwavering dedication of our educators to ensuring every student builds strong foundational reading skills for long-term academic success.



- **UPPER ELEMENTARY ELA PROFICIENCY TRENDS AND INSTRUCTIONAL RESPONSE**

A recent internal data review examined English Language Arts (ELA) proficiency trends for a single student cohort tracked from 3rd through 6th grade using state RISE assessment data. This analysis identified a systemic decline in ELA proficiency beginning at the transition into 4th grade, with performance failing to fully recover through 6th grade. The most significant decline occurs at the 3rd-to-4th grade transition, signaling a critical instructional inflection point.

Disaggregated results reveal disproportionate impacts on specific student groups. Male students experienced a 14.1 percentage-point drop in proficiency between 3rd and 4th grade, representing the sharpest single-year decline within the cohort. Hispanic students demonstrated persistent underperformance, averaging 15–20 points below the school-wide mean across four years, with little evidence of sustained growth. These patterns suggest that while early literacy instruction is effective, current upper-elementary instructional models are not adequately supporting increasing academic and linguistic demands.

The analysis points to misalignment between grade-level expectations, particularly as students shift from primarily narrative texts to more complex informational and analytical reading tasks. In response, school leadership has developed a targeted action plan focused on:

1. vertical alignment of literacy instruction across grades 3–6,
2. a curriculum audit emphasizing high-interest, content-rich informational texts, and
3. enhanced Tier 2 academic vocabulary supports, particularly for Hispanic students.

This work reflects a shift from reactive intervention to intentional, data-driven instructional improvement, with progress monitoring built into implementation. Ongoing updates will be provided to the Board as implementation proceeds and benchmark data becomes available.

- **ATHLETICS**

Legacy Prep student-athletes continue to exemplify dedication, teamwork, and school pride across all athletic programs. The girl's basketball season wrapped up just before winter break, marking the culmination of months of hard work, growth, and perseverance on the court. This week, the boy's basketball team officially kicked off their season, bringing fresh energy and excitement as they begin competition.



- **FINE ARTS**

Legacy Prep students showcased exceptional talent, creativity, and commitment through a variety of fine arts performances and events this winter. Highlights included the 5/6 After School Musical, which reflected students' confidence and collaboration, as well as strong representation at the Tri-State Band Festival. The Elementary Winter Concert and the Junior High Winter Concert and Art Show provided meaningful opportunities for students to demonstrate musical growth and artistic expression, while the Winter Ballroom Competition highlighted discipline, teamwork, and performance excellence. Together, these events celebrate the hard work of our students and educators in fostering creativity, confidence, and a well-rounded educational experience.



○ STUDENT ENRICHMENT AND SCHOOL TRADITIONS

Legacy Prep continues to strengthen its school culture through enriching activities and meaningful traditions that engage students and build community. Fall and winter highlights included festive Halloween celebrations, hands-on learning during 4th and 5th Grade Science Days, and the 1st Grade World Religions culminating activity, which showcased student learning, curiosity, and global awareness. Holiday classroom celebrations, schoolwide assemblies, and Holiday Sweater Day further fostered connection, joy, and school spirit. These experiences enrich the academic program while creating memorable moments that support student engagement and a strong sense of belonging.



STUDENT CHARACTER EDUCATION (PAIDEIA)

In November and December, our Paideia focus centered on “Nobility,” emphasizing the importance of acting with honor, integrity, and respect in all areas of school life. Students engaged in lessons and discussions exploring what it means to make ethical choices, treat others with dignity, and take responsibility for their actions—especially during moments when no one is watching. Teachers intentionally integrated this theme into classroom expectations, literature discussions, and reflective activities, helping students connect noble behavior to both personal character and academic responsibility.

Across grade levels, students demonstrated nobility through honesty, perseverance, and respectful interactions with peers and adults. School assemblies highlighted real-life examples of students choosing to do what is right, standing up for others, and modeling self-discipline and accountability. As the semester concluded, this focus reinforced the idea that true excellence is rooted not only in achievement, but in character—preparing students to lead with integrity within the school community and beyond.

COMMUNITY ENGAGEMENT

- **COMMUNITY ENGAGEMENT SUPPORT**

Legacy Prep families, staff, and community partners demonstrated strong generosity and civic responsibility through several meaningful service initiatives this season. Support for the school's Angel Account was strengthened through a LunchPro Chicken Dinner fundraiser, helping ensure that students' basic needs continue to be met. In addition, the school community rallied around the Angel Tree program, providing gifts and support to families during the holiday season. Legacy Prep also hosted an American Red Cross Blood Drive, offering students, families, and community members an opportunity to serve others through lifesaving donations. Together, these efforts reflect the school's ongoing commitment to compassion, service, and community partnership.

- **COMMUNITY ENGAGEMENT ACTIVITIES**

Community engagement remains a vital component of the Legacy Prep experience, reinforcing the strong partnership between families and the school in supporting student success. Events such as the Fall Festival brought together parents, siblings, grandparents, and extended family members, fostering connection, school pride, and a shared commitment to learning. Family involvement was also a key element of academic enrichment activities, including Early Civilization Day for 5th grade, Middle Ages Day for 4th grade, 1st Grade Science Day celebration, Career Day presentation during CCA class, and an amazing field trip to the Springville Art Gallery for our Junior High Art students. These immersive, hands-on experiences were enhanced by the presence and support of families, helping deepen student engagement, reinforce learning, and strengthen the sense of community that contributes to positive academic and social outcomes.

DRAFT: Legacy Preparatory Academy, UT

December 15, 2025

This report does not constitute a rating action.

Credit Highlights

- S&P Global Ratings affirmed its 'BBB-' rating on the [Utah Charter School Finance Authority](#)'s \$9.3 million series 2014 revenue bonds and \$14.2 million series 2022 revenue bonds, issued for [Legacy Preparatory Academy](#) (Legacy).
- The outlook is stable.

Rationale

Security

Legacy had \$21.98 million in debt outstanding as of June 30, 2025. The bonds are secured by Legacy's revenues, consisting primarily of per-pupil payments from the state, as defined in the governing bond documents. Bond covenants require the school to maintain maximum annual debt service (MADS) coverage of 1.05x and 30 days' cash on hand. The school used the proceeds from the series 2022 to fund the acquisition, construction, and furnishing of a new facility adjacent to its Woods Cross campus, which includes an auditorium and gymnasium. Legacy used a portion of the series 2022 bond funds for partial defeasance of the series 2014 bonds.

Credit overview

The rating reflects our view of Legacy's consistent demand, healthy liquidity position, and growing revenue base. We assessed the enterprise profile as adequate and the financial profile as adequate; combined, these credit factors lead to an anchor of 'bbb-' and a final rating of 'BBB-'.

The 'BBB-' rating reflects our opinion of Legacy's:

- History of positive operations, which we expect to continue through the outlook period;
- Solid liquidity position, at 209 days' cash on hand as of fiscal 2025, with no plans to spend down reserves;
- Lengthy charter history and favorable state funding environment; and
- Experienced and proactive management team.

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Partly offsetting these strengths, in our view, are:

- The school's moderately high debt burden; and
- The risk, as with all charter schools, that the school could be closed for nonperformance of its charter or for financial distress, prior to the final maturity of the bonds in 2052.

Environmental, social, and governance

We analyzed the school's environmental, social, and governance factors and consider them neutral in our credit rating analysis.

Outlook

The stable outlook reflects S&P Global Ratings' opinion that Legacy will likely continue to maintain enrollment levels, aiding in the school's continued positive financial performance and at least maintaining lease-adjusted MADS coverage and liquidity at current levels.

Downside scenario

We could lower the rating if enrollment levels fall below budgeted targets, such that lease-adjusted MADS coverage were to decline, or if there was an unexpected reduction in liquidity. Furthermore, we could lower the rating if the school issues additional debt, affecting its debt burden ratios to the extent that we no longer consider the rating to be commensurate with peers.

Upside scenario

A positive rating action is unlikely, in our view. However, we could take a positive rating action over time if the school's demand metrics considerably improve, including a strengthening of enrollment figures, coupled with improved lease-adjusted MADS coverage and liquidity levels commensurate with those of higher-rated peers.

Credit Opinion

Enterprise Profile

Legacy, situated on two adjacent campuses in the Salt Lake City area, is a kindergarten-through-ninth grade (K-9) charter school that began operations in fiscal 2006. Legacy completed its new campus on time and within budget in 2022. The school's mission is to build the foundation of knowledge and critical thinking skills necessary for children to become independent learners through a classically based curriculum, with an emphasis on fine arts.

In our view, the school's enrollment and demand profile has historically been sound, supported by historically stable enrollment, good student retention, and a moderate waitlist. The school's enrollment grew to more than 1,000 in the fall of 2024 and was 1,005 as of fall 2025. Despite the lack of a waitlist enrollment is expected to stay near current levels. Total enrollment capacity is 1,200, as stipulated under the charter. Total facility capacity is slightly greater, at approximately 1,290.

Legacy's programs allow it to capitalize on a growing population and support a steady market position, with minimal competition from area schools. Academically, the school performed about on par with its local school district and Utah overall in many components of the state's standardized test scores.

Based on our recent conversations with the authorizer, we view the school's charter standing and relationship with the authorizer as very good. Charter contracts in Utah are evergreen; therefore, they do not expire or require renewal, and they perpetuate indefinitely unless revoked. Legacy has continuously held its charter with Utah State Charter School Board for almost 20 years, and management reports that the school is in compliance with the terms of its charter. The statutory framework assessment reflects our opinion that, despite areas of risk, the framework is not likely to hamper Legacy's ability to pay debt service.

The school initially operated with two co-executive directors, but now operates with a single executive director and continues to contract Academica West to provide accounting, education, facility, human resources, legal, and compliance services for the school. Fees are charged on a per-student basis: \$400 per student for the first 550 students, and \$375 per student for more than 550 students. The contract is a five-year term, ending after November 2026.

The school has a seven-member board of trustees, and we believe its membership provides diverse professional experience that benefits its governance. We view both the board and senior staff as having managed well financially and operationally. To date, Legacy has successfully executed its strategic plans covering academics, enrollment, and construction of the new facility, which we view favorably.

Financial Profile

The school's financial performance can be characterized by consistently positive operating margins, resulting in healthy lease-adjusted MADS coverage. For fiscal 2025 the school produced a margin of more than 10% and has budgeted for margins just under 10% in fiscal 2026. For fiscal 2025, the school produced an EBIDA margin of about 25%, or approximately \$3.0 million, translating to lease-adjusted MADS coverage of approximately 1.9x. Despite the history of positive operating results, we view the school's operating profile as somewhat limited by an overall revenue base of around \$12 million in fiscal 2025, although that is an increase from about \$9.4 million in fiscal 2023, supported by enrollment growth and a trend of favorable state funding. State funding has increased by 6% in each of the last 3 fiscal years, though management is planning to budget for flat per pupil funding in fiscal 2027. We anticipate the school will continue to maintain surplus operations over the near term.

Legacy's unrestricted reserves as a percentage of debt for fiscal 2025 improved to 26% from 18.3% in fiscal 2023. As of fiscal year end reserves stand at \$5.7 million and management anticipates adding to unrestricted reserves in fiscal 2026; reserves have grown for the past two years after a decline of about \$700,000 in fiscal 2023 as funds were pulled out for the building project. Overall, the school's liquidity position remains healthy, with 209 days' cash on hand.

Lease-adjusted MADS is approximately \$1.57 million, occurring in 2031. This translates to an elevated debt burden of about 13.1%. The school has no additional contingent liabilities or off-balance-sheet debt. As with many charter schools, the organization's debt-to-capitalization ratio shows significant leverage on the school's balance sheet. For fiscal 2025, the debt-to-capitalization ratio was about 80.2%, an improvement from 84.5% in fiscal 2023. We view the school's debt burden as a limiting factor, although it could continue to moderate over time if revenues grow with projected enrollment levels and increases in state funding; however, we will continue to monitor the school's debt profile.

Legacy Preparatory Academy, Utah--Enterprise and financial statistics

	--Fiscal year ended June 30--						Medians for 'BBB-' rated charter schools
	2026	2025	2024	2023	2022	2024	
Enrollment							
Total headcount	1,005	1,058	992	940	908	1,395	
Total waiting list	0	8	73	46	0	MNR	
Waiting list as % of enrollment	0.0	0.8	7.4	4.9	0.0	23.6	
Financial performance							
Accounting standard	GASB	GASB	GASB	GASB	GASB	MNR	
Total revenues (\$000s)	N.A.	12,020	11,162	9,361	9,928	20,977	
Total expenses (\$000s)	N.A.	10,807	10,497	9,174	9,071	MNR	
EBIDA (\$000s)	N.A.	2,992	2,448	1,839	2,442	MNR	
EBIDA margin (%)	N.A.	24.9	21.9	19.6	24.6	16.6	
Excess revenues over expenses (\$000s)	N.A.	1,213	665	187	857	MNR	
Excess income margin (%)	N.A.	10.1	6.0	2.0	8.6	6.0	
Operating lease expense (\$000)	N.A.	N.A.	N.A.	N.A.	N.A.	MNR	
Pension/OPEB adjustments (\$000)	N.A.	N.A.	N.A.	N.A.	N.A.	MNR	
Lease adjusted annual debt service (\$000)	N.A.	1,623	1,664	1,613	763	MNR	
Lease-adjusted annual debt service coverage (x)	N.A.	1.84	1.47	1.14	3.20	MNR	
Lease-adjusted annual debt service burden (% total revenues)	N.A.	13.5	14.9	17.2	7.7	MNR	
Lease-adjusted MADS (\$000s)	N.A.	1,570	1,570	1,570	1,570	1,777	
Lease-adjusted MADS coverage (x)	N.A.	1.91	1.56	1.17	1.56	2.10	
Lease-adjusted MADS burden (% total revenues)	N.A.	13.1	14.1	16.8	15.8	8.8	
Total revenue per student (\$)	N.A.	11,361	11,252	9,959	10,934	MNR	
Balance sheet metrics							
Unrestricted reserves (\$000s)	N.A.	5,721	5,463	4,261	4,949	MNR	
Days' cash on hand	N.A.	209.0	204.8	182.7	207.1	191.0	
Total long-term debt (\$000s)	N.A.	21,981	22,621	23,240	23,544	MNR	
Unrestricted reserves to debt (%)	N.A.	26.0	24.2	18.3	21.0	43.3	
Unrestricted net assets as % of expenses	N.A.	54.4	56.1	50.1	54.7	43.5	
Debt to capitalization (%)	N.A.	80.2	80.6	84.5	83.1	72.3	
Debt per student (\$)	N.A.	20,776	22,803	24,723	25,930	15,953	
Operating lease expense--Annual amount paid in facilities/capital lease payments; excludes equipment/nonfacility lease payments and excludes payments related to principal and interest on bonds. Net revenue available for debt service = EBIDA + operating lease expense. Lease-adjusted MADS coverage = (net revenue available for debt service + operating lease expense) / (lease-adjusted MADS). Total expenses include pension and OPEB adjustments. Pension and OPEB adjustments = reconciling adjustments made to financial information to account for differences in GASB 68 and GASB 75. MADS--Maximum annual debt service. N.A.--Not available. N.M.--Not Meaningful.							

Ratings List

Current Ratings

Education

Legacy Preparatory Academy, UT Charter School Revenues	BBB-/Stable
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The ratings appearing below the new issues represent an aggregation of debt issues (ASID) associated with related maturities. The maturities similarly reflect our opinion about the creditworthiness of the U.S. Public Finance obligor's legal pledge for payment of the financial obligation. Nevertheless, these maturities may have different credit ratings than the rating presented next to the ASID depending on whether or not additional legal pledge(s) support the specific maturity's payment obligation, such as credit enhancement, as a result of defeasance, or other factors.

DRAFT

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January 15, 2026

Dear Superintendent,

The Legacy Preparatory Academy Governing Board approved LEA-Specific educator licenses to one individual in a public meeting held on January 15, 2026. The license areas, and endorsements shall be valid for three (3) academic years as indicated on the attached spreadsheet which contains the associated educator information and rationale for the request. All LEA Specific licenses will expire on June 30th of the final academic year approved.

Legacy Preparatory Academy's Governing Board offers the following assurances:

- The LEA has adopted a policy, in accordance with R277-301-7, to prepare and support educators with an LEA-Specific license. This policy is posted online at: <https://tinyurl.com/LPABoardPolicyManual>
- The educator has completed a criminal background check in accordance with Rule R277-214 and continued monitoring in accordance with Subsection 53G-11-403(1).
- The LEA will provide requisite training (educator ethics, classroom management/instruction, special education law/instruction, & Utah Effective Teaching Standards) within the 1st year of employment.
- The educators will complete the USBE Ethics Review within one (1) calendar year prior to being issued the license.
- The LEA will post all educator data, including assignments, in CACTUS no later than sixty (60) days following the date of the public governing board meeting approving the license area(s) and/or endorsement(s).
- Each LEA school employing an individual with an LEA-Specific license will prominently post the following on the school's website:
 - Disclosure that the school employs individuals holding an LEA-Specific educator license, license areas, and/or endorsements.
 - An explanation of the types of educator licenses issued by USBE (Professional, Associate, LEA-Specific):

The following designations or levels apply to educator licenses, license areas (i.e.-elementary, secondary, special education), and content endorsements (i.e.-mathematics, music, Spanish, social studies):

- Professional: The educator has completed an educator preparation program that includes content and pedagogical knowledge. This program may have been completed at a university or in an alternate pathway that was supported by school districts/charters and the Utah State Board of Education.



- Associate: The educator is currently completing an educator preparation program but has not yet completed all requirements for a Professional Educator License, license area, or endorsement. The educator is enrolled in a university-based or Local Education Agency (LEA)-based program. When the educator completes the program, they will have a professional level.
- LEA-Specific: A temporary license issued by the USBE to individuals who don't meet the criteria for a Professional or Associate Educator license.
 - Percentage (based on FTE) of types of licenses, license areas, and endorsements held by educators employed in the school.
 - A link to the Utah Educator Look-up Tool.

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

Sincerely,

John Cook
President
Legacy Preparatory Academy

SY25-26 LEA-Specific Requests

LEA (District	Date LEA's Began	CACTUS ID	Last Name	First Name	Is this a RENE License Area	Endorsement	Endorsement Rational/Motions	Is Educator's Has LEA Spec	Does Educator Has LEA Spec	Does Educator Has LEA Application Received? (Y/N)
Granite SD	1/5/21	999999	Example	Educator	N	Secondary	Math Level 3 Chemistry	Y	Y	Y
Legacy Prepa	1/15/26	824364	McFall	Kathryn	N	Elementary		The educator is enrolling in EPP Fall 2021.	N	Y
								The educator is currently completing their degree and pursuing licensure.	Y	N

Month End Report (Prior vs Current)

Account	Category Type	Prior YTD	Current YTD	Budget	% of Budget	Forecast	% of Forecast
Revenue - 1000 Local Revenue 54% (11 Account records)							
1510 Interest on Investments	Revenue	191,936	161,448	350,000	46%	350,000	46%
1610 Sales to Students	Revenue	100,215	93,460	180,000	52%	180,000	52%
1620 Sales to Adults	Revenue	1,099	1,234	2,000	62%	2,000	62%
1710 Admissions	Revenue	8,539	7,088	18,900	38%	18,900	38%
1743 Curricular Activity Fees	Revenue	51,761	31,913	38,750	82%	38,750	82%
1747 Extra-Curricular Activity Fees	Revenue	15,980	16,898	21,660	78%	21,660	78%
1750 School Vending & Stores (Gross Sales)	Revenue	14,314	7,462	29,500	25%	29,500	25%
1760 Fines	Revenue	567	128	500	26%	500	26%
1910 Rentals	Revenue	6,185	7,965	8,000	100%	8,000	100%
1920 Contributions and Donations From Private Sources	Revenue	7,255	18,537	7,500	247%	22,000	84%
1990 Miscellaneous	Revenue	27,548	33,402	5,000	668%	37,000	90%
TOT		425,399	379,536	661,810		708,310	
Revenue - 3000 State Revenue 51% (8 Account records)							
3005 Regular School Programs K	Revenue	210,612	212,124	423,211	50%	424,247	50%
3010 Regular School Programs 1-12	Revenue	1,923,293	1,988,952	3,935,676	51%	3,953,679	50%
3020 Professional Staff	Revenue	159,039	0	0	0%	0	0%
3100 Restricted Basic School Programs	Revenue	680,301	683,783	1,386,444	49%	1,344,620	51%
3200 Related to the Basic Programs	Revenue	1,751,551	2,029,212	4,116,353	49%	3,969,396	51%
3400 Other Programs	Revenue	468,463	556,896	933,631	60%	947,568	59%
3500 One-time Funding	Revenue	278,825	317,330	561,208	57%	568,647	56%
3800 Non-MSP State Revenues (via USBE)	Revenue	29,684	46,866	302,218	16%	336,118	14%
TOT		5,501,768	5,835,163	11,658,742		11,544,275	
Revenue - 4000 Federal Revenue 18% (4 Account records)							
4522 IDEA - B -- Pre-School Disabled (Sec 619)	Revenue		0	2,497	0%	2,568	0%
4524 IDEA - B -- Disabled (PL 101-476)	Revenue	0		148,367	0%	152,796	0%
4560 Federal Child Nutrition Programs	Revenue	57,325	79,171	160,000	49%	188,774	42%
4800 Federal No Child Left Behind	Revenue	0	0	70,900	0%	88,126	0%
TOT		57,325	79,171	381,764		432,265	
Expense - 100 Salaries 43% (7 Account records)							
0121 Salaries - Principals and Assistants	Expense	-244,035	-249,083	-560,000	44%	-560,000	44%
0131 Salaries - Teachers	Expense	-1,606,489	-1,655,422	-3,922,399	42%	-3,922,399	42%
0132 Salaries - Substitute Teachers	Expense	-20,380	-37,531	-50,400	74%	-50,400	74%
0142 Salaries - Guidance Personnel	Expense	-57,175	-90,278	-155,000	58%	-155,000	58%
0152 Salaries - Secretarial and Clerical Personnel	Expense	-114,749	-127,044	-225,000	56%	-225,000	56%
0161 Salaries - Teacher Aides and Para-Professionals	Expense	-217,442	-247,229	-627,000	39%	-627,000	39%
0184 Salaries - Administrative Technology Personnel	Expense	-24,772	-24,773	-52,000	48%	-52,000	48%
TOT		-2,285,043	-2,431,362	-5,591,799		-5,591,799	
Expense - 200 Employee Benefits 40% (6 Account records)							
0220 Social Security	Expense	-163,781	-177,020	-427,773	41%	-427,773	41%
0230 Local Retirement	Expense	-99,516	-89,174	-240,000	37%	-240,000	37%
0240 Group Insurance	Expense	-328,850	-349,045	-817,594	43%	-817,594	43%
0270 Industrial Insurance	Expense	-4,045	-4,674	-12,725	37%	-12,725	37%
0280 Unemployment Insurance	Expense	-16,640	-18,120	-57,880	31%	-57,880	31%
0290 Other Employee Benefits	Expense	-9,600	-6,000	-20,200	30%	-20,200	30%
TOT		-622,432	-644,033	-1,576,171		-1,576,171	
Expense - 300 Professional & Tech Services 48% (6 Account records)							
0320 Professional - Educational Services	Expense	-77,099	-56,941	-190,000	30%	-190,000	30%
0330 Professional Employee Training and Development	Expense	-27,954	-49,702	-81,600	61%	-81,600	61%

Account	Category Type	Prior YTD	Current YTD	Budget	% of Budget	Forecast	% of Forecast
0340 Other Professional Services	Expense	-8,401	-17,252	-75,000	23%	-75,000	23%
0345 Business Services	Expense	-211,109	-198,050	-430,342	46%	-430,342	46%
0349 Purchased Legal Services	Expense	-5,575	-21,071	-5,000	421%	-30,000	70%
0350 Technical Services	Expense	-73,507	-67,397	-132,000	51%	-132,000	51%
TOT		-403,645	-410,412	-913,942		-938,942	
Expense - 400 Property Services 56% (9 Account records)							
0411 Water/Sewage	Expense	-10,280	-10,063	-20,000	50%	-20,000	50%
0412 Disposal Service	Expense	-6,614	-10,036	-15,000	67%	-15,000	67%
0422 Snow Removal Services	Expense			-8,000	0%	-8,000	0%
0423 Custodial Services	Expense	-78,450	-76,822	-160,000	48%	-160,000	48%
0424 Lawn Care Services	Expense	-23,129	-22,273	-50,000	45%	-50,000	45%
0430 Repairs & Maintenance Services	Expense	-41,151	-21,588	-75,000	29%	-75,000	29%
0442 Rental of Equipment & Vehicles	Expense	-22,609	-22,548	-51,140	44%	-51,140	44%
0450 Construction Services	Expense	-50,621	-340,542	-550,000	62%	-550,000	62%
0490 Other Purchased Property Services	Expense	-2,422	-6,157	-12,000	51%	-12,000	51%
TOT		-235,277	-510,029	-941,140		-941,140	
Expense - 500 Other Services 49% (9 Account records)							
0513 Student Transportation Services - Commercial	Expense			-10,000	0%	-10,000	0%
0517 Student Overnight Trips/Field Trips	Expense			-3,500	0%	-3,500	0%
0518 Student Day Trips/Field Trips (includes Admission Charges)	Expense	-625	-575	-2,000	29%	-2,000	29%
0522 Liability Insurance	Expense	-73,282	-79,645	-77,000	103%	-83,000	96%
0530 Communication (Telephone & Other)	Expense	-3,001	-2,966	-6,800	44%	-6,800	44%
0540 Advertising	Expense	-2,323	-34	-3,000	1%	-3,000	1%
0561 Student Tuition to other LEAs In State	Expense	-225	-75	-500	15%	-500	15%
0570 Food Service Management	Expense	-189,676	-178,349	-500,000	36%	-500,000	36%
0580 Travel/Per Diem	Expense	-28		-500	0%	-500	0%
TOT		-269,159	-261,644	-603,300		-609,300	
Expense - 600 Supplies & Materials 70% (11 Account records)							
0610 General Supplies	Expense	-121,040	-109,601	-200,000	55%	-192,000	57%
0610-001 Furniture and Fixtures (not capitalized)	Expense	-2,652	-9,915	-10,000	99%	-15,000	66%
0610-002 Other Food Purchases	Expense	-2,944	-2,405	-4,000	60%	-4,000	60%
0621 Natural Gas	Expense	-4,305	-3,911	-30,000	13%	-30,000	13%
0622 Electricity	Expense	-47,763	-50,783	-80,000	63%	-80,000	63%
0641 Textbooks	Expense	-36,372	-25,059	-60,000	42%	-60,000	42%
0642 E-Textbooks / Online Curriculum	Expense	-56,410	-51,159	-65,000	79%	-65,000	79%
0644 Library Books	Expense		-937	0	0%	0	0%
0650 Supplies - Technology Related	Expense	-117,837	-306,071	-116,740	262%	-309,851	99%
0670 Software	Expense	-100,900	-49,083	-110,000	45%	-110,000	45%
0680 Maintenance Supplies and Materials	Expense	-15,511	-19,954	-35,000	57%	-35,000	57%
TOT		-505,734	-628,878	-710,740		-900,851	
Expense - 700 Property 37% (3 Account records)							
0710 Land and Site Improvements	Expense		-14,440	-50,000	29%	-50,000	29%
0730 Equipment	Expense	-48,875	-99,604	-314,718	32%	-159,718	62%
0733 Capitalized Furniture and Fixtures	Expense	-110,541		-95,500	0%	-95,500	0%
TOT		-159,416	-114,044	-460,218		-305,218	
Expense - 800 Debt Service and Misc. 29% (4 Account records)							
0810 Dues and Fees	Expense	-47,512	-23,375	-87,000	27%	-87,000	27%
0830 Interest	Expense	-463,950	-451,925	-903,850	50%	-903,850	50%
0833 Amortization of Bond Issuance & Other Related Costs	Expense			-35,000	0%	-35,000	0%
0840 Redemption of Principal	Expense	0	0	-615,000	0%	-615,000	0%
TOT		-511,462	-475,300	-1,640,850		-1,640,850	
TOT		992,324	818,169	264,155		180,578	

Budget Summary

 12/31/2025
 50% of the Year

Month End Report

Category	Type	YTD Actual	Budget	% of Budget	Forecast	% of Forecast
Revenue (3 Category records)						
1000 Local Revenue	Revenue	379,536	661,810	57%	708,310	54%
3000 State Revenue	Revenue	5,835,163	11,658,742	50%	11,544,275	51%
4000 Federal Revenue	Revenue	79,171	381,764	21%	432,265	18%
TOT		6,293,870	12,702,315		12,684,850	
Expense (8 Category records)						
100 Salaries	Expense	-2,431,362	-5,591,799	43%	-5,591,799	43%
200 Employee Benefits	Expense	-644,033	-1,576,171	41%	-1,576,171	41%
300 Professional & Tech Services	Expense	-410,412	-913,942	45%	-938,942	44%
400 Property Services	Expense	-510,029	-941,140	54%	-941,140	54%
500 Other Services	Expense	-261,644	-603,300	43%	-609,300	43%
600 Supplies & Materials	Expense	-628,878	-710,740	88%	-900,851	70%
700 Property	Expense	-114,044	-460,218	25%	-305,218	37%
800 Debt Service and Misc.	Expense	-475,300	-1,640,850	29%	-1,640,850	29%
TOT		-5,475,701	-12,438,161		-12,504,272	
TOT		818,169	264,155		180,578	

Financial Ratios

Bond Ratio	Covenant	Forecast
Debt Service Ratio	>1.10	1.70
Days Cash	>30 Days	208

Budget Analysis

YTD amounts outside of 50% elapsed time:

State Revenue

1. Forecast reduced by a net total of \$114,467.

Federal Revenue

1. Forecast increased by \$50,501 due to Title I, and Title IV adjustments.

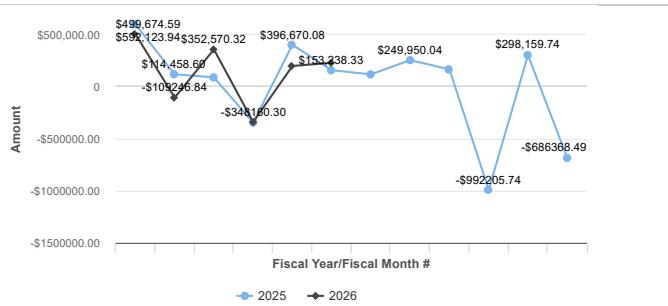
Expenses

1. Salaries and Benefits - as expected due to timing of employee contracts.
2. Property and Construction - Lunchroom construction not as high as expected for FY26 (see table below), so there is room to mitigate loss of State Revenue.

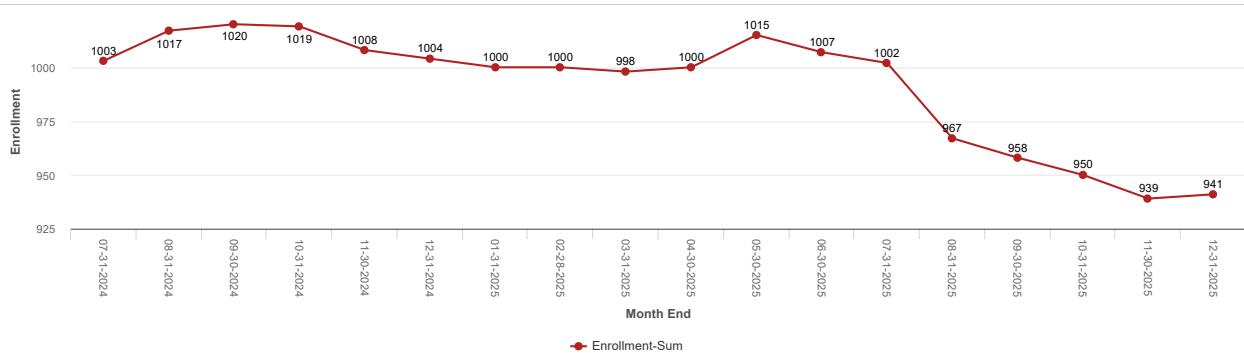
Capital Accounts

Account	Month End Amount	Budget	Forecast
0450 Construction Services	-340,542	-550,000	-550,000
0710 Land and Site Improvements	-14,440	-50,000	-50,000
0730 Equipment	-99,604	-314,718	-159,718
0733 Capitalized Furniture and Fixtures	-95,500	-95,500	-95,500
TOT	-454,585	-1,010,218	-855,218

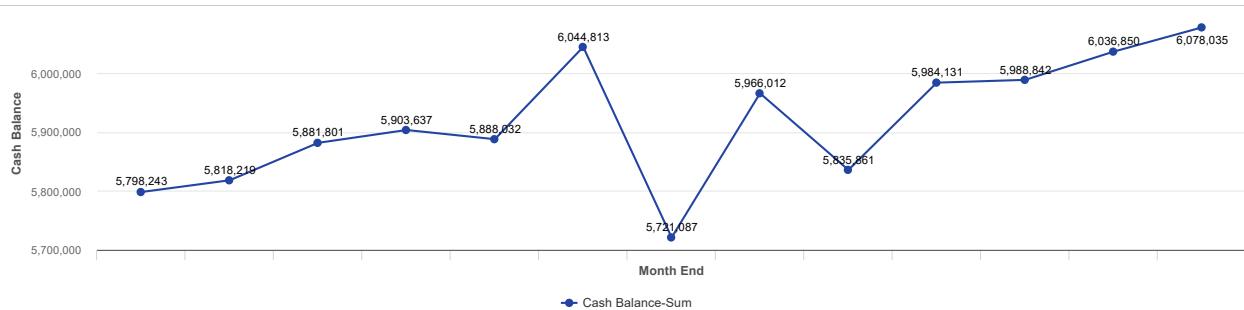
Monthly Change in Net Position



Enrollment Line Graph



Unrestricted Cash Balance



Selection, Approval and Purchase of Instructional Materials Policy

Adopted: April 13, 2023

Amended: November 12, 2025

Purpose

The purpose of this policy is to establish the parameters by which Legacy Preparatory 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(l)(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-2077(l)(a)(i), or (ii), or (iii).

"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).

“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 Director

The Board of Directors (the “Board”) delegates to the School Director 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.

The Director shall select and approve instructional materials that meet the criteria set forth in this policy. When considering instructional materials, the Director may review the USBE’s recommended instructional materials (RIMs), but the Director is not required to select RIMs if there are other instructional materials available that meet the criteria set forth in this policy.

The Director shall involve School community parents and instructional staff in the consideration of instructional materials. The Director has discretion as to how to involve such parents and instructional staff in this process.

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 Director 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.

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 Director 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.

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 Director 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 Director or the Board.

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 Director 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.

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 Director(s) shall designate two or more School employees to make this initial determination for the School (a Director 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;

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 Director(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

- (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 Director(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.

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 Director(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
- (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) 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 Legacy Preparatory Academy? Yes No
- 6) Are you a parent of a student of Legacy Preparatory Academy? Yes No
- 7) Are you an employee of Legacy Preparatory Academy? Yes No
- 8) Are you a board member of Legacy Preparatory 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 Legacy Preparatory Academy? Yes No
- 7) Are you a parent of a student of Legacy Preparatory Academy? Yes No
- 8) Are you an employee of Legacy Preparatory Academy? Yes No
- 9) Are you a board member of Legacy Preparatory Academy? Yes No

Information about Challenged Instructional Material:

- 1) Title:
- 2) Author:
- 3) Publisher:
- 4) 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.

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. Paid parental and postpartum recovery leave under this policy is in addition to an employee's regular paid time off (PTO). 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 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 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 that occurs at 20 weeks or greater gestation;
- (b) the adoption of a child;
- (c) the appointment of legal guardianship of a child or incapacitated adult; or
- (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) shall be used in a single continuous period, unless:

- (1) by mutual written agreement between the School and the parental leave eligible employee; or
- (2) a health care provider certifies that intermittent leave is medically necessary due to a serious health condition of the child;
- (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.

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.

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.

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 Director(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 the School's Director(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 Director(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 Director(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 time off (PTO) or any other leave a qualified employee is entitled to under the School's leave policies.

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.

Student Conduct and Discipline Policy

Adopted: May 12, 2022

Amended: September 21, 2023

Purpose

The purpose of Legacy Preparatory Academy's (the "School") Student Conduct and Discipline Policy is to help all students develop positive relationships with other students and adults, take responsibility for their actions and learning, and develop the self-discipline necessary to create an environment that is characterized by physical and emotional safety in order to enhance learning for everyone.

The School will foster a School and community-wide expectation of good citizenship for students and a sense of responsibility in the School community for rules and standards of behavior.

Policy

It is the School's policy to promote a safe and orderly school environment for all students and employees. Accordingly, the School holds all students, employees, and other adults to the highest standards of behavior in the classroom, on School grounds, in School vehicles, and during School-sponsored activities. Criminal acts or disruptive behavior of any kind will not be tolerated, and any individual who engages in such activity will be subject to disciplinary action, criminal prosecution, or both.

It is the School's policy to provide equal educational and employment opportunity for all individuals. Therefore, the School prohibits all discrimination on the basis of race, color, religion, sex, age, national origin, disability, citizenship status, or genetic information. Complaints of discrimination or unfair application of this policy should be submitted pursuant to the School's grievance policies.

The School's Director is authorized to suspend or expel regular education students in accordance with, and to the extent permitted by, state and federal law. The Director is also authorized to suspend students with disabilities in accordance with, and to the extent permitted by, state and federal law, but before any suspension or other removal constituting a change of placement can take place, the School shall follow the rules and procedures outlined in the Utah State Board of Education Special Education Rules.

The Director shall establish administrative procedures regarding student conduct and discipline at the School that are consist with this policy and applicable law.

Fee Waiver Policy

Adopted: May 12, 2022

Approved: May 21, 2024

Amended: October 10, 2024

Purpose

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

Policy

Under the direction of the Board, the Director is authorized to administer this policy and is directed to do so fairly, objectively, and without delay, and in a manner that avoids stigma and unreasonable burdens on students or parents/guardians.

Definitions

“Common education expense”

- (a) means an expense the School incurs that is related to the delivery of instruction for all courses, unrelated to a specific course, program, or activity; and
- (b) includes the employment of educators and staff, the provision of capital facilities, and operation and maintenance costs.

“Course” or “class”

- (a) means an activity, a course, or a program that the School:
 - (i) intends to deliver instruction;
 - (ii) provides, sponsors, or supports; and
 - (iii) conducts primarily during school hours.
- (b) includes a course in which a student is required to enroll as a condition of participation in a separate extracurricular activity.

“Discretionary project” means a project that a student completes in lieu of or in addition to a required classroom project in accordance with Section 53G-7-503.

"Extracurricular activity"

- (a) means an activity or a program that:
 - (i) is not a course; and
 - (ii) the School provides, sponsors, or supports.
- (b) does not include a noncurricular club as defined in Section 53G-7-701.

"Fee" means a charge, expense, deposit, rental, or payment:

- (a) regardless of how the School terms, describes, requests, or requires the charge, expense, deposit, rental, or payment, directly or indirectly;
- (b) in the form of money, goods, or services; and
- (c) that is a condition to a student's full participation in or admission to an activity, course, or program that the School provides, sponsors, or supports.

"Fee" includes:

- (a) payments to a third party that provides a part of a School activity, class, or program; and
- (b) a fine other than a fine described below.

"Fee" does not include:

- (a) a student fine that the School approves for:
 - (i) failing to return School property;
 - (ii) losing, wasting, or damaging private or School property through intentional, careless, or irresponsible behavior, including defacing or damaging School property as described in Utah Code 53G-8-212; or
 - (iii) improper use of School property, including a parking violation;
- (b) a payment for School breakfast or lunch;
- (c) a deposit that:
 - (i) is a pledge securing the return of School property; and
 - (ii) the School refunds upon the return of School property;
- (d) a charge for insurance, unless the insurance is required for a student to participate in an activity, course, or program; or
- (e) money or another item of monetary value that a student or the student's family raises through fundraising.

"Fee course" means a course that is not a non-fee course.

"Instructional equipment"

- (a) means an activity-, course-, or program-related tool that:
 - (i) a student is required to use as part of an activity, course, or program in a secondary school; and
 - (ii) becomes the property of the student upon exiting the activity, course, or program.

(b) does not include School equipment, an instructional supply, or a personal student supply for a secondary student.

“Instructional supply”

- (a) means a non-reusable or a consumable material or supply that is necessary to use, expend, or deplete as a component or element of an activity, course, or program in a secondary school.
- (b) does not include a personal student supply for a secondary student.

“Non-fee course” means a course that results in course credit or a course grade within the core standards the USBE establishes under Section 53E-4-202 and other statutory requirements for:

- (a) English language arts;
- (b) health education;
- (c) mathematics;
- (d) science; and
- (e) social studies

“Non-waivable charge” means a cost, payment, or expenditure that:

- (a) is a personal discretionary charge or purchase, including:
 - (i) a charge for insurance, unless the insurance is required for a student to participate in an activity, class, or program;
 - (ii) a charge for college credit:
 - (A) from an institution of higher education; or
 - (B) for post-secondary related courses; or
 - (iii) except when requested or required by the School, a charge for a personal consumable item such as a yearbook, class ring, letterman jacket or sweater, or other similar item;
- (b) is subject to sales tax as described in Utah State Tax Commission Publication 35, Sales Tax Information for Public and Private Elementary and Secondary Schools; or
- (c) by Utah Code, federal law, or State Board of Education rule is designated not to be a fee, including:
 - (i) a school uniform as provided in Utah Code § 53G-7-801;
 - (ii) a school lunch; or
 - (iii) a charge for a replacement for damaged or lost School equipment or supplies.

“Personal student supply”

- (a) means, for a secondary student, an object, tool, material, or supply that:
 - (i) is the personal property of the student;

- (ii) regardless of the use of the supply in the instructional process, individuals not enrolled in the course or activity also commonly purchase and use; and
- (iii) has a high probability of regular use in activities other than School-sponsored activities.

(b) includes pencils, papers, notebooks, crayons, scissors, and basic clothing.

"Provided, sponsored, or supported by the School"

- (a) means an activity, class, program, club, camp, clinic, or other event that:
 - (i) is authorized by the School; or
 - (ii) satisfies at least one of the following conditions:
 - (A) the activity, class, program, club, camp, clinic, or other event is managed or supervised by the School, or a School employee in the employees School employment capacity;
 - (B) the activity, class, program, club, camp, clinic, or other event uses, more than inconsequentially, the School's facilities, equipment, or other School resources; or
 - (C) the activity, class, program, club, camp, clinic, or other event is supported or subsidized, more than inconsequentially, by public funds, including the School's activity funds or minimum school program dollars.
- (b) does not include an activity, class, or program that meets the criteria of a noncurricular club as described in Title 53G, Chapter 7, Part 7, Student Clubs.

"Provision in lieu of fee"

- (a) means an alternative to fee payment; and
- (b) may include a plan under which fees are paid in installments or under some other delayed payment arrangement or a service in lieu of fee payment agreement.

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

- (a) fully participate in school or in a School activity, class, or program;
- (b) successfully complete a School class for the highest grade; or
- (c) avoid a direct or indirect limitation on full participation in a School activity, class, or program, including limitations created by:
 - (i) peer pressure, shaming, stigmatizing, bullying, or the like; or
 - (ii) withholding or curtailing any privilege that is otherwise provided to any other student.

"School activity clothing" means special shoes or items of clothing that:

- (a) meet specific requirements, including requesting a specific brand, fabric, or imprint;
- (b) the School requires a student to provide and to wear for an activity-, course-, or program-related activity; and
- (c) that the student rents while participating in the activity, or become the property of the student upon exiting the activity, course, or program.

"School activity clothing" does not include:

- (a) a school uniform; or
- (b) clothing that is commonly found in students' homes.

"School equipment" means a machine, equipment, facility, or tool that:

- (a) is durable;
- (b) is reusable;
- (c) a secondary school owns; and
- (d) a student uses as part of an activity, course, or program in a secondary school.

"Something of monetary value"

- (a) means a charge, expense, deposit, rental, fine, or payment, regardless of how the payment is termed, described, requested or required directly or indirectly, in the form of money, goods or services; and
- (b) includes:
 - (i) charges or expenditures for a School field trip or activity trip, including related transportation, food, lodging, and admission charges;
 - (ii) payments made to a third party that provide a part of a School activity, class, or program;
 - (iii) classroom textbooks, supplies or materials;
 - (iv) charges or expenditures for school activity clothing; and
 - (v) a fine, except for a student fine specifically approved the School for:
 - (A) failing to return School property;
 - (B) losing, wasting, or damaging private or School property through intentional, careless, or irresponsible behavior; or
 - (C) improper use of School property, including a parking violation.
- (c) does not include a payment or charge for damages, which may reasonably be attributed to normal wear and tear.

"Textbook"

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

- (b) includes:
 - (i) a hardcopy book or printed pages of instructional material, including a consumable workbook; or
 - (ii) computer hardware, software, or digital content; and
- (c) does not include School equipment, instructional equipment, or instructional supplies.

“Waiver” means a full release from:

- (a) a requirement to pay a fee; and
- (b) any provision in lieu of fee payment.

General School Fees Provisions

The School may only charge a fee for an activity, class, or program provided, sponsored, or supported by the School that is noticed and authorized by School policies and state law.

If the School imposes a fee:

- (a) the fee shall be directly related to the expense incurred by the School in providing for a student the activity, course, or program for which the School imposes a fee;
- (b) the fee shall be equal to or less than the expense described immediately above; and
- (c) the School may not impose an additional fee or increase a fee to supplant or subsidize another fee that the School is prohibited from charging, including the normal expense of delivering instruction in a course.

The School may not sell textbooks or otherwise charge a fee for textbooks, except for a textbook used for a concurrent enrollment, International Baccalaureate, or Advanced Placement course.

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

The School shall not charge a fee that is general in nature and for a service or good that does not have a direct benefit to the student paying the fee. In addition, the School may not charge a fee for a common education expense.

Beginning for the 2026-2027 school year, the School shall, with respect to awarding secondary students credit toward graduation, ensure that it has at least one option for each graduation requirement that:

- (a) fulfills the graduation requirement; and
- (b) does not require the payment or waiver of any fee.

However, the restriction above does not apply to the School if the School only offers one of the following for a given graduation requirement:

- (a) an Advanced Placement course;
- (b) an International Baccalaureate course; or
- (c) a concurrent enrollment course, as described in Section 53E-10-302.

Fees for Classes & Activities During the Regular School Day

Fees for Students in Kindergarten through Sixth Grade

The School may not charge a fee in kindergarten through sixth grade for materials, textbooks, supplies, or for any class or regular school day activity (except for discretionary projects), including assemblies and field trips.

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

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

The School may charge a fee to a student in grade six if all of the following are true:

- (a) the School has students in any of the grades seven through twelve;
- (b) the School follows a secondary model of delivering instruction to the School's grade six students; and
- (c) The School annually provides notice to parents that the School will collect fees from grade six students and that the fees are subject to waiver.

Fees for Students in Seventh through Ninth Grade

Fees may be charged in grades 7-9 in connection with an activity, class, or program provided, sponsored, or supported by the School that takes place during the regular school day if the fee is noticed and approved as provided in R277-407 and is allowed to be charged by state law. All such fees are subject to waiver. In addition, if an established or approved class requires payment of fees or purchase of items in order for students to fully participate and to have the opportunity to acquire skills and knowledge required for full credit and highest grades, the fees or costs for the class are subject to waiver.

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

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

The School may charge students in grades 7-9 a fee for:

- (a) relating to a non-fee course or a fee course, for:
 - (i) instructional equipment;
 - (ii) a School field trip or activity trip or performance, including related transportation, food, lodging, and admission charges or participation fees;
 - (iii) School activity clothing;
 - (iv) a discretionary project as described herein; or
 - (v) a competency remediation program in accordance with Section 53G-9-803;
- (b) an expense related to a course, activity, or program that is a fee course, including:
 - (i) instructional supplies;
 - (ii) the life-cycle replacement costs for School equipment directed related to the fee course;
 - (iii) a music instrument rental;
 - (iv) licensing fees for fine arts intellectual property; or
 - (v) participating in a driver education course described in Section 53G-10-503;
- (c) an expense related to the following post-secondary-related courses, including tuition, college credit, an exam, or a textbook:
 - (i) an Advanced Placement course;
 - (ii) an International Baccalaureate course; or
 - (iii) a concurrent enrollment course, as described in Section 53E-10-302.

If the School charges fees for a fee course or a non-fee course, such fees are limited to those described above.

Fees for Optional Projects

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

additional discretionary project results in pressure on a student by teachers or peers to also complete a similar high cost project.

Fees for Activities Outside of the Regular School Day

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

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

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

Fees for Extracurricular Activities

The School may charge students in grades 7-9 fees for an extracurricular activity. The School may also charge students in grades K-6 fees for an extracurricular activity if it takes place outside of the regular school day and meets the other requirements described above. A fee for an extracurricular activity for students in grades 7-9 may include the life-cycle replacement costs for School equipment directly related to the extracurricular activity.

A fee related to an extracurricular activity may not exceed the maximum fee amounts for the extracurricular activity adopted by the Board, as provided below.

Other Miscellaneous Fees

Fees for Adult Education

The School may charge students in grades 7-9 fees for an adult education course in accordance with Section 53E-10-202.

Fees for Remediation Programs

The School may charge students in grades 7-9 fees to participate in the School's remediation programs.

The School may not charge students in grades K-6 fees to participate in the School's remediation programs.

Fees for Charter School Application Processing

The School may charge students in grades 7-9 a fee for charter school application processing in accordance with Section 53G-6-503.

Fee Schedule

The Board will approve a Fee Schedule at least once each year on or before June 1. The Fee Schedule will establish the maximum fee amount per student for each activity and the maximum total aggregate fee amount per student per school year. No fee may be charged or assessed related to an activity, class, or program provided, sponsored, or supported by the School, including for a course or extracurricular activity, unless the fee has been set and approved by the Board, is equal to or less than the established maximum fee amount for the activity, and is included in the approved Fee Schedule.

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

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

After the Fee Schedule is adopted, the Board may amend the Fee Schedule using the same process.

Maximum Fee Amounts

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

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

Notice to Parents

The Director will annually provide written notice of the School's Fee Schedule and Fee Waiver Policy to the parent or guardian of each student in the School by ensuring that a written copy of the School's Fee Schedule and Fee Waiver Policy is included with all registration materials provided to potential or continuing students each year. The Fee Schedule shall clearly identify any fee for each activity, course, or program alongside the description of the activity, course, or program.

The School will also post the following on its website each school year:

- (a) The School's Fee Schedule, including maximum fee amounts, and Fee Waiver Policy;
- (b) The School's fee waiver application;
- (c) The School's fee waiver decision and appeals form; and
- (d) The School's fee notice(s) for families.

Donations

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

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

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

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

Fee Collection

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

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

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

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

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

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

Fee Refunds

Student fees are non-refundable.

Budgeting and Spending Revenue Collected Through Fees

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

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

School Fee Collections & Accounting Procedures

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

Fees must be received and deposited in a timely manner.

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

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

Fee Waiver Provisions

To ensure that no student is denied the opportunity to participate in a class or activity that is provided, sponsored, or supported by the School because of an inability to pay a fee, the School provides fee waivers or other provisions in lieu of a fee. Fee waivers or other provisions in lieu of a fee payment will be available to any student whose parent cannot pay a fee.

All fees are subject to waiver.

Non-waivable charges are not subject to waiver.

Fee Waiver Administration

The Director will administer this policy and will review and grant fee waiver requests or designate another staff member to do so. The process for obtaining waivers or pursuing alternatives will be administered in accordance with this policy, fairly, objectively, and without delay, and in a manner that

avoids stigma, embarrassment, undue attention, and unreasonable burdens on students and parents.

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

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

Fee Waiver Eligibility

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

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

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

The School will not subject a family to unreasonable demands for re-qualification.

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

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

The School may retroactively waive fees if eligibility can be determined to exist before the date of the fee waiver application.

Fee Waiver Approval Process

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

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

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

Each year the School will maintain documentation regarding the number of School students who were given fee waivers, the number of School students who worked in lieu of fee waivers, the number of School students who were denied fee waivers, the total dollar value of student fees waived by the School, and the total dollar amount of all fees charged to students at the School, as this information may be requested by the Utah State Board of Education as part of its monitoring of the School's school fees practices.

The School shall also submit school fee revenue information in the Utah Public Education Financial System as provided in R277-113.

Appeal Process

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

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

Alternatives to Fees and Fee Waivers

The School may allow a student to perform service or another approved task (as described in Utah Code § 53G-7-504(2)) in lieu of paying a fee or, in the case of an eligible student, in lieu receiving a fee waiver, but such alternatives may not be required. If the School allows an alternative to satisfy a fee requirement, the Director will explore with the interested student and his or her parent/guardian the alternatives available for satisfying the fee requirement, and parents will be given the opportunity to review proposed alternatives to fees and fee waivers. However, if a student is eligible for a waiver, textbook fees must be waived, and no alternative in lieu of a fee waiver is permissible for such fees.

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

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

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

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

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

The School may provide optional individual fundraising opportunities for students to raise money to offset the cost of the student's fees as provided in R277-408.

Annual Review, Approval, and Training

The Board will review and approve this policy annually.

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