



QUEST ACADEMY

INNOVATION • PASSION • MASTERY

Quest Academy Board Meeting Agenda

Date: May 21, 2026

Time: 6:00 PM

Location: 4862 W 4000 S, West Haven, UT 84401- Q2 Conference Room

Mission Statement

Quest Academy is committed to providing students with a challenging, technology-rich learning environment that empowers young citizens to become leaders prepared to thrive in an evolving global community.

Board Priorities

- State Accountability
- Fiscally Sound Operations
- Personalized/Individualized Learning
- Brand Awareness

Call to Order

- Steve Reeve

Public Comment (Comments are limited to three minutes per individual)

Consent Items

- Approval of Apr. 14, 2026, Board Meeting Minutes

Reports

- Administrative Report
 - State of the School

- Positive Behavior Report
- Title IX Report
- Enrollment
- Staffing Changes
- Financial Report
 - Fraud Risk Assessment

Closed Session

Purpose: Discussion of the character, professional competence, or physical or mental health of an individual, pursuant to Utah Code §52-4-205.

Voting & Discussion Items

- **LEGISLATIVE UPDATE**
- **REVIEW & SIGN:** Quest Academy Board Member Annual Commitment to Ethical Behavior
- **POLICIES**
 - **NEW POLICIES: Review and Approve**
 - Approval of Board Member Oath of Office Policy
 - Approval of Cybersecurity Policy
 - Approval of Artificial Intelligence (AI) Use Policy
 - Approval of Cardiac Emergency Response Plan Policy
 - Approval of Dyslexia Screening and Intervention Policy
 - Approval of Noncurricular Clubs / Equal Access Policy
 - Approval of Parental, Postpartum, Adoption, and Foster Leave Policy
 - Approval of Restraint, Seclusion, and LRBI Policy
 - Approval of School Security (School Security Act) Policy
 - Approval of Threat Assessment Policy
 - Approval of TSSA Calculation and Distribution Policy
 - Approval of Elementary and Secondary School General Core Policy
 - **MODIFIED POLICIES: Review and Approve**

- Approval of Parent and Family Engagement Policy
- Approval of Wellness Policy
- Approval of Absenteeism and Truancy Prevention Policy
- Approval of Acceptable Use / Electronic Device Use Policy
- Approval of Criminal Background Check / Arrest Reporting Policy
- Approval of LEA-Specific Educator License Policy
- Approval of Internet Safety Policy (CIPA)
- Approval of Meal Charge Policy
- Approval of Open Enrollment / Lottery Policy
- Approval of Religious Expression in Public Schools Policy
- Approval of School Fees Policy
- Approval of Student Conduct & Discipline Policy
- Approval of Student Data Privacy & Security Policy + Data Governance Plan
- Approval of Health and Welfare Policy
- Approval of Student Credit Policy
- Approval of Government Records Access Management Act (GRAMA) Policy
- Approval of Special Education Policies & Procedures Manual
- **ANNUAL POLICY REVIEW:**
 - Salary Supplement for Highly Needed Educators Program Policy
- Approval of Emergency Preparedness & Recovery Plan
- Approval of Mental Health Grant
- Approval of Board Member Terms, Roles, and Elected Officers
- Approval of Sexual Education Committee
- Approval of Teacher and Student Success (TSSA) Plan
- Approval of Director Employment Agreement and Compensation

- Audit Engagement Letter
- Approval of Final Amended Budget 2025/2026
- Approval of Proposed Budget 2026/2027
- Approval of the Expenditures for the Relocation and Installation of a Portable.
- **BOARD TRAINING:**
 - Open and Public Meetings Act Training
 - Sex Ed. Assurances Local Health Dept. Data

Calendaring

2026/2027 Board Meeting Schedule

Adjournment

The meeting will adjourn upon completion of all agenda items.



QUEST ACADEMY

INNOVATION • PASSION • MASTERY

Quest Academy Board Meeting Minutes

Date: April 14, 2026

Time: 6:00 PM

Location: 4862 W 4000 S, West Haven, UT 84401

In Attendance: Steve Reeve, Brett Greenwell, Nicole Boucher, Brittney Hale, Stacey Phillips, Shawn Miehlke

Others in Attendance: Dave Bullock, Angelee Spader, Casey Arrington, Nicole Jones, Josh Broadbent

Mission Statement

Quest Academy is committed to providing students with a challenging, technology-rich learning environment that empowers young citizens to become leaders prepared to thrive in an evolving global community.

Board Priorities

- State Accountability
- Fiscally Sound Operations
- Personalized/Individualized Learning
- Brand Awareness

Call to Order- Steve Reeve called the meeting to order at 6:05pm. Board members roll called in.

Public Comment (Comments are limited to three minutes per individual)

- 2026–2027 Fee Schedule & Fee Waiver Policy — Second Comment Period

Consent Items

- Approval of Feb. 10, 2026 Board Meeting Minutes
- Approval of Mar. 11, 2026, Board Meeting Minutes and Closed Session Statement

Nicole Boucher made a motion to approve the Feb 10, 2026, Board Meeting Minutes and the Mar. 11, 2026 Board Meeting Minutes and Closed Session Statement.

Brittney Hale seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brett Greenwell, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye.

Reports

- **Administrative Report**
 - State of the School
 - S&P Global Rating

Dave and the board focused on reviewing construction plans for a school expansion project, with the administration presenting updated designs for a second-floor addition including a cafeteria, classrooms, and storage space. The estimated cost was discussed at approximately \$6 million, with the administration noting they had maintained their BBB rating from S&P Global and were working with Silver Peak architecture firm.

- **Financial Report**

Brett and Josh reported on the state of the budget as of the end of March. Financial updates indicated the school had strong cash reserves at \$10 million with 319 days of operating funds, serving 981 students across all grade levels. The financial situation was reported to be stable, with most spending on track or behind schedule, and some grant money requests in progress.

Voting & Discussion Items

- **Approval of the LEA Specific License for the 2025-2026 School Year**

The LEA Specific License for the 2025-2026 school year was reviewed by board members. One of our employees is a long-term sub, so they are requiring approval for an LEA Specific license for 9th grade Science and Earth Science. The board discussed teacher retention and staffing changes, including a few teacher retirements and some staff moving between positions.

Nicole Boucher made a motion to approve the LEA Specific License for Rebecca Montgomery for the 2025-2026 school year. Brett Greenwell seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye, and Brett Greenwell, Aye.

- **Approval of the Amended 2026-2027 Fee Schedule and Fee Waiver Policy**

The Amended Fee Schedule and Fee Waiver Policy were reviewed by board members. The amendments to the fee scheduled were made to align with legislative requirements. 9th grade fees were removed to non-fee courses and a fee change to an extracurricular fee were made.

Stacey Phillips made a motion to approve the Amended Fee Schedule and Fee Waiver Policy. Shawn Miehke seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye, and Brett Greenwell, Aye.

- **Approval of the Kindergarten iPads**

The Kindergarten iPad purchase was discussed. Brittney discussed recent community discussions around electronic usage. Dave discussed the vision and mission of the school and the rationale behind the tech focus. Dave mentioned that once they discuss the meaning behind tech use and the benefits, parents support it.

Shawn Miehke made a motion to approve the Kindergarten iPad Purchase. Brittney Hale seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye, and Brett Greenwell, Aye.

- **Approval of the 2nd Grade Chromebooks**

The 2nd Grade Chromebook purchase was discussed.

Shawn Miehke made a motion to approve the Kindergarten iPad Purchase. Brittney Hale seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye, and Brett Greenwell, Aye.

- **Approval of the 6th Grade Chromebooks and Storage Cart**

The 6th Grade Chromebook and Storage Carts purchase was discussed.

Shawn Miehke made a motion to approve the Kindergarten iPad Purchase. Brittney Hale seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehke, Aye, and Brett Greenwell, Aye.

- **Review of Board Priorities**

Dave discussed the need to address the board priorities as some of them are not aligned with vision and current work. Dave wants the board to be envisioning new board priorities that align with the work and strategic plans discussed.

Calendaring

- The next Board Meeting needs to be rescheduled due to board member schedule conflicts: The new date will be May 21, 2026, at 6:00 PM (In Person).

Adjournment

At 6:47PM Nicole Boucher made a motion to adjourn the meeting. Stacey Phillips seconded. The motion passed unanimously. The votes were as follows: Steve Reeve, Aye; Brittney Hale, Aye; Nicole Boucher, Aye; Stacey Phillips, Aye; Shawn Miehle, Aye, and Brett Greenwell, Aye.

DRAFT

UTAH TITLE IX ATHLETICS REPORTING

Before the beginning of each academic year, the athletic director or another administrator of each school shall report to the school's local governing board regarding Title IX. Below are the details for each reporting category.

REQUIREMENTS:

The number and type of interscholastic sports available at the school, categorized by gender designation:
The number of students competing in a gender-designated interscholastic sport at the school, categorized by gender:
The amount of spending that the school devotes to each gender-designated sport, reported in total amount and on a per-student basis:
A comparison and evaluation of designated practice and game locations in gender-designated interscholastic sports:
Any information regarding the school's efforts in compliance with Title 63G, Chapter 31, Part 2, Distinctions on the Basis of Sex, and Title IX:
Is there a 10% or greater discrepancy between male-designated and female-designated sports? If yes, provide an action plan that the school develops to address the discrepancy.

UTAH TITLE IX ATHLETICS REPORTING

2025-2026

Category	Female-Designated Interscholastic Sports	Male-Designated Interscholastic Sports	Co-Ed Interscholastic Sports
Number and Type of Interscholastic Sports Available	<i>Basketball</i> <i>Volleyball</i>	Basketball Soccer	Track: 47 Cross Country: 32
Number of Students Competing in a Gender-Designated Interscholastic Sport	Basketball:15 Volleyball: 10 Total: 25	Basketball: 14 Soccer: 22 Total: 36	Track: 46 Cross Country: 32 Total: 78
Amount of Spending the School Devotes to Each Gender- Designated Interscholastic Sport* <i>The dollar amounts in this row include all funds spent by the school on gender-designated interscholastic sports, including fees collected from students/parents and then subsequently spent by the school on gender-designated interscholastic sports.</i>	Basketball Number of students: 15 Student Fee: \$65 Actual spent per student: \$124.60 Budget allocation: \$1,900 Total Spent: \$1,869 Girls Volleyball	Basketball Number of students: 14 Student Fee: \$65 Actual spent per student: \$200,29 Budget allocation: \$2,900 Total Spent: \$2,804 Soccer	Track (Co-ed) Number of students: 46 Student Fee: \$30 Actual spent per student: \$43.78 Budget allocation: \$2,100 Total Spent: \$2,014 Cross Country (Co-ed)

	Number of students: 10 Student Fee: \$65 Actual spent per student: \$146.60 Budget allocation: \$1,500 Total Spent: \$1,466	Number of students: 22 Student Fee: \$65 Actual spent per student: \$88.64 Budget allocation: \$2,000 Total Spent: \$1,950	Number of students: 32 Student Fee: \$30 Actual spent per student: \$76,90 Budget allocation: \$2,500 Total Spent: \$2,461
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Gender-Designated Interscholastic Sports Comparison and Evaluation

Sport	Practice Locations	Home Game Locations	Notes
Girls Basketball	Quest Jr. High Gym	Quest Jr. High Gym	
Girls Volleyball	Quest Jr. High Gym	Quest Jr. High Gym	
Boys Basketball	Quest Jr. High Gym	Quest Jr. High Gym	
Boys Soccer	Quest field	West Haven Sports Park	
Track	Quest Property and Track	Quest Property and Track	
Cross Country	Quest Property and Track	Quest Property and Track	

Efforts by School to Comply with Utah Code 63G-31-201 et seq. (Distinctions on the Basis of Sex) and Title IX

Category	Compliance Efforts by School
Providing Separate Accommodations for Males and Females to Protect Individual Privacy, Health, and Competitive Opportunity	The school complies with applicable laws and policies by providing separate accommodations for males and females to ensure privacy, health, and fair competition.
Not Providing a Sex-Designated Facility, Program, or Event of a Higher Quality to One Sex and of a Lesser Quality to the Opposite Sex	Both sexes are provided facilities, programs, and events of equal quality.
Not Providing Males or Females Preferred or More Advantageous Scheduling of Facilities, Programs, or Events in Comparison to the Opposite Sex	Neither sex has a more advantageous scheduling of facilities, programs, or events.
Not Providing Males or Females with More Sex-Designated Opportunities than the Opposite Sex in Excess of a 10% Disparity	Both sexes have the same number of opportunities.
Not Requiring Males or Females to Participate or Compete Against the Opposite Sex in any Sex-Designated Facility, Program, or Event	Neither sex is required to participate or compete against the opposite sex in sex-designated facilities, programs, or events.
Not Requiring, Giving Official Authorization For, or Knowingly Allowing Males or Females to Use a Sex-Designated Facility in the Presence of the Opposite Sex	Males or females are not required, given authorization for, or knowingly allowed to use sex-designated facilities in the presence of the opposite sex.

Action Plan to Address Discrepancy (10% or greater) Between Male-Designated and Female-Designated Interscholastic Sports at the School

The school does not currently have a need for an Action Plan to address a discrepancy of 10% or greater between male-designated and female-designated interscholastic sports, as the opportunities are balanced and compliant with applicable regulations.

2026 LEGISLATIVE UPDATE

Utah General Session — Education Legislation

Prepared for the School Director and Board of Directors

Prepared by Alliant Charter Services | May 2026

Executive Summary

The 2026 Utah General Session was one of the most consequential sessions for charter schools in recent memory. Lawmakers passed more than 100 education-related bills, appropriated approximately \$9.0 billion in K-12 funding for FY2027, and created roughly 66 new or amended requirements split between LEAs and the Utah State Board of Education. The majority of new LEA requirements (23 of 34) are unfunded mandates.

Three themes dominate: (1) school safety, including new guardian, cybersecurity, threat-reporting, and seclusion-room standards; (2) classroom technology and AI, with statewide device restrictions and required AI-use policies; and (3) early literacy, with a 2030 grade-level reading goal that will trigger mandatory 3rd-grade retention beginning in 2029-30.

For charter schools specifically, three provisions warrant immediate Board attention: (a) SB 186 requires every governing board member to take an oath of office and the school to maintain a record; (b) SB 164 transfers construction oversight to DFCM and imposes administrative penalties up to \$25,000 for non-compliance; and (c) HB 273 requires Board-adopted technology and AI policies on a defined timeline. Most other provisions affect operations, but several require Board policy adoption in a public meeting.

This update summarizes (1) the headline numbers, (2) FY2027 budget and funding, (3) a consolidated compliance calendar, (4) charter-specific provisions, (5) required Board policy actions, and (6) bills with the highest operational impact. Detailed source materials are referenced at the end.

By the Numbers

The session at a glance:

\$500 Million in new education funding statewide	+4.2% WPU value increase (\$4,674 → \$4,870)
\$9.0 Billion estimated total FY2027 K-12 budget	34 new/amended LEA requirements (23 unfunded)
32 new/amended USBE requirements (22 unfunded)	51 new State Board administrative rules expected
12 / 8 new reports for USBE / for LEAs	5 new RFPs

Budget & Funding Highlights

HB 1 (Public Education Base Budget) and SB 2 (Public Education Budget Amendments) together set FY2027 appropriations. The WPU increase is entirely inflation-driven, and Digital Teaching and Learning (DTL) and Educator-Initiated Salary Pool (EISP) funding have been removed and reallocated.

Program / Appropriation	Amount	Type
WPU Value (FY2027)	\$4,870 (+4.2%)	Ongoing
Total Minimum School Program (MSP)	\$7.65 billion (+4.0%)	Ongoing
Catalyst Center + Supplemental	\$100,537,800	One-Time
Educator Professional Time	\$78,300,000	One-Time
APEX Center (formerly Catalyst)	\$35,000,000	One-Time
Students At-Risk Add-On	\$24,833,200	Ongoing
Early Literacy	\$16,000,000	Ongoing
Gold Medal Schools Pilot (5-yr)	\$15,000,000	One-Time
Stipends for Future Educators	\$12,400,000	One-Time
Teacher Supplies & Materials	\$8,800,000	One-Time
Adobe Creative Cloud (statewide)	\$6,750,000	One-Time
Grow Your Own Teacher Pipeline	\$5,000,000	One-Time
Rural Schools Athletic Facilities Grant	\$5,000,000	One-Time
STEM Endorsement Incentives	\$3,600,000	One-Time
Reduced-Price School Lunch	\$2,516,900	One-Time
MASTER Teacher Program	\$2,400,000	One-Time
Comprehensive School Improvement Pilot	\$4,500,000	One-Time

Additional notes for the Board:

- DTL application is no longer required (SB 2).
- Catalyst Center has been renamed APEX (Applied Professional Education Experience) under SB 34.
- The flexible allocation fund is renamed "Teacher and Classroom Salary Support" (SB 62) and is restricted to compensation for classroom teachers, aides, and paraprofessionals.
- School Meals Debt Relief Fund created (HB 148); LEAs must report meal debt annually by June 30 beginning 2027.

Charter-Specific Provisions Requiring Board Attention

SB 186 — Charter School Modifications

Effective May 6, 2026.

- Every member of the governing Board must take an oath of office, and the school must maintain a record of each oath.
- Proof of oath compliance must be provided to the authorizer upon request.
- The Charter School Revolving Account is replaced by the Charter School Revolving Fund.
- USBE will conduct a study of charter school administrative costs and funding by December 1, 2026 — a potential basis for future funding-equity legislation.
- **Recommended Board action:** Add an oath-of-office administration to the next Board meeting agenda; designate a custodian of records; update Board onboarding to include the oath.

SB 131 — Charter School Eligibility

Effective July 1, 2026.

- Adds a new enrollment preference for students residing in the political subdivision containing the charter school whose school of residence is at capacity.
- **Recommended Board action:** Direct staff to update enrollment policy and lottery procedures before the next open enrollment cycle.

SB 164 — School Construction Amendments

Effective July 1, 2026.

- Construction oversight transfers from USBE to the Division of Facilities and Construction Management (DFCM).
- Pre-construction applications must be submitted to DFCM and tracked in DFCM's online document management system.
- Projects over \$500,000 must use contractors from a state-managed registry.
- Projects under \$3 million must use design-bid-build unless DFCM approves an alternative delivery method.
- Administrative penalties of \$1,000 to \$25,000 may be imposed for non-compliance.
- **Recommended Board action:** Any planned facilities work — improvements, additions, refinancing-funded projects — should be reviewed against the new DFCM process before authorization.

SB 34 — Public Education Revisions (APEX/Catalyst)

Effective May 6, 2026.

- Catalyst Center renamed to APEX.
- Charter schools are explicitly required to develop reintegration plans within 5 days of notification of a student arrest for a serious offense.

HB 467 — Utah Fits All Scholarship Program Modifications

Effective May 6, 2026.

- LEAs may not deny scholarship students access to athletics or extracurricular activities based on scholarship status.
- Requirements for scholarship students may not be more restrictive than those applied to homeschool or private-school students.

Compliance Calendar

The most important deadlines for budget and policy planning purposes:

Effective / Due Date	Bill(s)	What's Required
May 6, 2026	HB 44, SB 34, SB 51, SB 52, SB 81, SB 123, SB 152, SB 167, SB 186, SB 295, SB 312, HB 75, HB 146, HB 148, HB 163, HB 188, HB 218, HB 299, HB 426, HB 467, HB 502	Most policy and operational changes take effect, including school safety personnel standards (HB 44), charter board oath of office (SB 186), threat-flag reporting (SB 51), reintegration plans (SB 167), juvenile justice referrals (HB 188), and citizenship grading authority (HB 502).
July 1, 2026	HB 1, HB 55, HB 65, HB 142, HB 143, HB 145, HB 273, HB 312, HB 329, HB 351, HB 358, HB 393, HB 448, SB 58, SB 62, SB 69, SB 88, SB 131, SB 164, SB 181, SB 241, SB 244, SB 267, SB 296	FY2027 budget begins; majority of operational mandates take effect — personal device prohibition (SB 69), seclusion-room standards (SB 181), early literacy plan requirements (SB 241), DFCM construction oversight (SB 164), AED/cardiac response (SB 244), classroom technology policy framework (HB 273).
July 4, 2026	SB 268	Religious curriculum protections take effect.
August 1, 2026	HB 293	Student athlete protections / athletic association standards take effect.
December 1, 2026	SB 186	USBE charter school administrative cost & funding study due.
December 31, 2026	SB 181	Seclusion room compliance reports due to USBE (location, status, remediation timeline).
School Year 2026–27	SB 244	Adopted cardiac emergency response plan must be in place.
January 1, 2027	HB 276, SB 236	AI / digital voyeurism provisions and property tax exemption changes take effect.
June 30, 2027	HB 148	First annual school meal debt data report due to USBE.
July 1, 2027	HB 147, HB 273, HB 448, SB 267, SB 296	Electronic form submission required; LEA technology and AI policies must be adopted; USDB partnership funding rules begin; secure digital consent mechanism required.
August 1, 2027	SB 152	Required student data sharing with Utah Board of Higher Education implemented.
2027–28 SY	HB 502, SB 268	Statewide test-out option begins; religious curriculum standards implemented.

Effective / Due Date	Bill(s)	What's Required
2029–30 SY	SB 241	Mandatory 3rd-grade retention begins for students not meeting reading benchmarks.
July 1, 2030	HB 312, SB 241	Full social studies curriculum implementation; 80% literacy goal target year.

Bill Summaries by Topic

Selected bills with the highest operational impact. A complete summary including action items is maintained in the Compliance shared drive.

School Safety & Security

HB 44 — School Security Personnel Standards (Effective May 6, 2026)

Requires school guardians to conceal-carry on-person at all times during duty; mandates visitor management systems; requires wearable panic alert devices for lead teachers and safety personnel; requires LEA compliance with minimum cybersecurity standards aligned with industry frameworks; requires updating device policies to include AI glasses; requires reporting cybersecurity incidents to USBE within 24 hours.

SB 51 — School Safety Modifications (Effective July 1, 2026)

Establishes a statewide student threat flag in the SIS. LEAs must report when a student presents a credible threat and authorized personnel from other LEAs may access the flag.

SB 181 — School Discipline Amendments / Seclusion Rooms (Effective July 1, 2026)

Establishes minimum physical and safety standards for seclusion rooms (size, lighting, ventilation, climate, fire/privacy code alignment) and mandates continuous audio/video recording. Restricts use to emergencies with 30-minute time limits. Requires periodic safety inspections and a one-time compliance report to USBE by December 31, 2026.

SB 167 — Reintegration for Disciplined Students (Effective May 6, 2026)

Permits boards to deny enrollment for safety concerns or past violations. Requires record review before enrollment and a 5-day transfer turnaround. Reintegration plans within 7 days of school resuming for summer arrests; plans must remain in effect for 180 days or a full school year.

SB 244 — Cardiac Emergency Response Plans (Effective July 1, 2026)

Every school must have a cardiac emergency response plan in place for the 2026-2027 school year. AEDs must be placed, tested, and maintained; appropriate staff must be trained in first aid, CPR, and AED use. USBE grant funding is available.

Technology, AI & Cybersecurity

HB 273 — Classroom Technology Amendments (Effective July 1, 2026; policies due July 1, 2027)

Requires LEAs to adopt model policies on balanced technology use and AI in classrooms. Instructional technology must have demonstrated educational value and be free of distracting design features. LEAs must minimize non-essential screen time, create resource plans for students with technology-related learning difficulties, and adopt an AI use policy by July 1, 2027. Compliance certification is required to receive digital literacy funding.

SB 69 — School Device Revisions (Effective July 1, 2026)

Prohibits personal device use during the entire school day, including lunch, breaks, and transitions. Codifies the school day as the entire duration from first bell to last. LEAs must establish a process for parents to request brief, non-instructional accommodations.

HB 218 — Digital Skills Amendments (Effective May 6, 2026; courses begin 2027-28)

Requires USBE to establish digital literacy course standards for 7th and 8th grade. The course replaces the traditional typing class and incorporates AI literacy, reputation management, and digital footprint education.

HB 55 — Privacy Compliance for Education Technology Vendors (Effective July 1, 2026)

Ed-tech vendor contracts must include provisions for termination within 30 days upon a privacy violation. Vendors must delete all student data absent parental consent. Termination fees are prohibited.

Curriculum, Standards & Instruction**HB 312 — Curriculum and Standards Modifications (Effective July 1, 2026)**

Requires social studies instruction in all elementary grades, separate semester courses for U.S. history and constitutional government in high school (3.5 units total), integration of social studies into literacy instruction beginning 2028-29, and use of primary source documents. Full implementation by July 1, 2030.

SB 241 — Early Literacy (Effective July 1, 2026)

Sets a 2030 statewide goal of 80% reading proficiency by end of 3rd grade. Requires individualized reading plans for K-3 students below benchmark within 45 days of notification. Prohibits the three-cueing model except where required by IEP/504. Schools below the statewide goal must allocate at least 50% of TSSA funds to evidence-based literacy strategies. Beginning 2029-30, 3rd graders not meeting benchmarks may be retained, with an LEA appeals process required.

SB 268 — Religious Curriculum (Effective July 4, 2026)

Requires instruction on the role of religion and religious liberty in American constitutional government beginning no later than 2027-28. Students may express religious beliefs in assignments without penalty.

Attendance, Grading & Student Policies**SB 58 — Public School Attendance Amendments (Effective July 1, 2026)**

Requires regular attendance data review, tiered intervention systems for chronic absenteeism, annual internal data accuracy review, and a toilet-training requirement for enrollment with disability exemptions. The governing Board must review attendance data and interventions annually. LEAs failing data standards face corrective action and potential funding withholding.

HB 502 — School Attendance Modifications (Effective May 6, 2026)

Allows LEAs to adopt citizenship grading policies (up to 10% for attendance in grades 7-12; up to 20% with LEA policy). Creates a test-out option for core classes in grades 9-12 beginning 2027-28. Establishes a citizenship-linked scholarship program.

Personnel, Licensing & Leave**HB 329 — State Employee Maternity and Leave Amendments (Effective July 1, 2026)**

Increases postpartum leave to six weeks; adoption leave to three weeks (child under 18) or six weeks (child under 6); foster leave to four weeks for LEA employees. Written information about leave opportunities must be provided to all employees.

SB 312 — Educator License Amendments (Effective May 6, 2026)

Creates a tiered framework for employment restrictions following licensure denial. Mandates dismissal for qualifying serious misconduct. Prohibits employment of restricted individuals in paid or volunteer capacity.

SB 52 — Substitute Teaching Requirements (Effective May 6, 2026)

Removes the teaching license requirement for long-term substitute teachers.

Student Data Privacy & Consent**SB 296 — Student Consent Amendments (Effective July 1, 2026; mechanism due July 1, 2027)**

Schools must offer a secure digital mechanism for obtaining informed consent for data disclosure. Bundling unrelated terms with consent is prohibited. Students must be able to review information before authorizing and revoke consent at any time. Parental consent is required for students under 18.

SB 152 — Public and Higher Education Collaboration (Effective May 6, 2026; data sharing by August 1, 2027)

Requires sharing student data for grades 7-12 with the Utah Board of Higher Education. Parents must be notified of data collection and right to opt out.

Student Welfare & Special Populations**HB 143 — Special Education Amendments (Effective July 1, 2026)**

Requires 30-day advance written notice to families of special education students before boundary changes, including reason, new school details, IEP scheduling information, and transportation arrangements. LEAs must provide opportunity for comment and document all feedback before making final decisions.

HB 351 — Vision Screening Amendments (Effective July 1, 2026)

Requires follow-up with parents within 30 days when a student fails an initial vision screening.

HB 448 — Utah Schools for the Deaf and Blind Amendments (Effective July 1, 2026)

Makes USDB a single agency under USBE. LEAs entering educational partnerships with USDB must count students in ADM and remit 95% of funding beginning July 1, 2027.

Juvenile Justice & Discipline**HB 188 — Juvenile Justice Amendments (Effective May 6, 2026)**

Requires direct court referral after a third on-campus drug possession offense, with parent notification. The reporting employee's identity remains confidential. Authorizes principal searches based on reasonable belief; seized evidence is admissible. Requires e-cigarette disposal if not referred to law enforcement.

Recommended Board Discussion Items

Items to consider for the next regular Board meeting and the FY2027 calendar:

- Schedule oath of office for all Board members (SB 186) and confirm record-keeping designation.
- Authorize the Director to draft updated personal device, internet filtering, technology, AI, and citizenship grading policies for Board adoption.
- Review whether the school operates any seclusion space that would trigger SB 181 — and direct any necessary remediation in time for the December 31, 2026 USBE report.
- Confirm that the school's cardiac emergency response plan will be in place for the start of the 2026-27 school year and authorize a USBE grant application.

- Review FY2027 budget assumptions in light of the WPU increase, the loss of DTL/EISP funding, and the renaming of the flexible allocation fund.
- Direct the Director to evaluate any planned facilities work against the new SB 164 / DFCM process before final authorization.
- Discuss the Board's posture on optional provisions: citizenship grading (HB 502), AI sandbox courses in CTE (HB 273), and dyslexia screening pilot participation (HB 393).
- Review enrollment policy updates for the new capacity-based preference (SB 131) before the next enrollment cycle.



Financial Summary
as of April 30, 2026

83.3% through the Year

BUDGET REPORT

EXPENSES

RATIOS

Enrollment

Revenue

1000 Local
3000 State
4000 Federal
Total Revenue

Expenses

100 Salaries
200 Benefits
300 Prof & Technical Services
400 Purchased Property Services
500 Other Purchase Services
600 Supplies and Materials
700 Property, Equipment
800 Debt Service and Misc
Total Expenses

Net Income from Operations

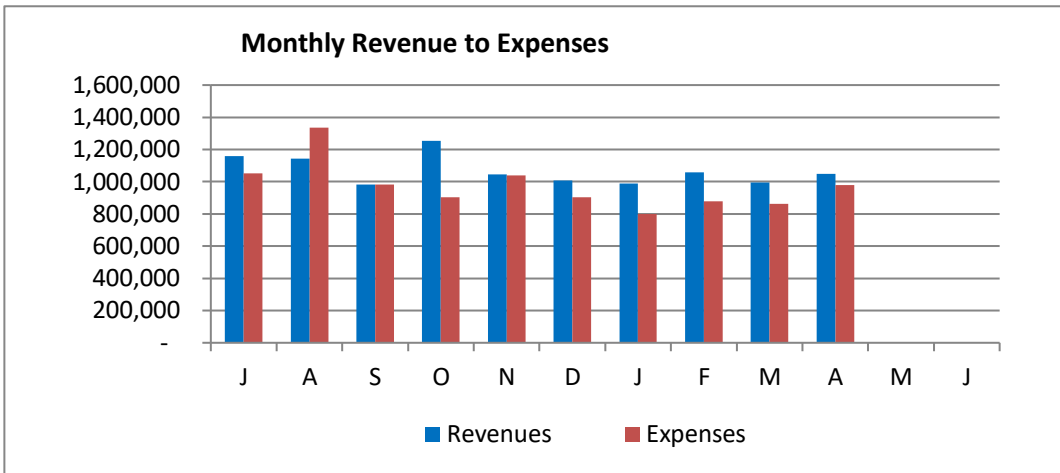
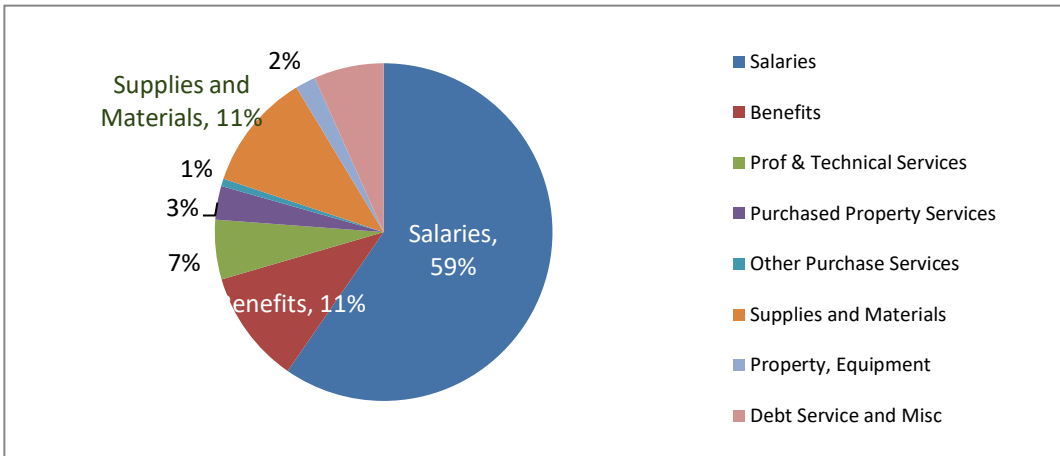
Operating Margin

	Year-to Date Actuals	Approved Budget	Forecast	% of Forecast
Enrollment	1002	1008	1002	
Revenue				
1000 Local	\$ 738,005	\$ 725,000	\$ 819,783	90.0%
3000 State	\$ 9,723,775	\$ 11,480,000	\$ 11,605,074	83.8%
4000 Federal	\$ 140,526	\$ 380,000	\$ 380,000	37.0%
Total Revenue	\$ 10,602,306	\$ 12,585,000	\$ 12,804,857	82.8%
Expenses				
100 Salaries	\$ 5,751,233	\$ 6,925,800	\$ 7,325,038	78.5%
200 Benefits	\$ 1,148,631	\$ 1,175,000	\$ 1,333,703	86.1%
300 Prof & Technical Services	\$ 557,314	\$ 970,000	\$ 700,650	79.5%
400 Purchased Property Services	\$ 239,973	\$ 380,000	\$ 396,000	60.6%
500 Other Purchase Services	\$ 70,573	\$ 100,000	\$ 88,120	80.1%
600 Supplies and Materials	\$ 1,202,484	\$ 1,407,500	\$ 1,381,369	87.1%
700 Property, Equipment	\$ 39,417	\$ 200,000	\$ 239,491	16.5%
800 Debt Service and Misc	\$ 671,128	\$ 841,700	\$ 821,700	81.7%
Total Expenses	\$ 9,680,753	\$ 12,000,000	\$ 12,286,071	78.8%
Net Income from Operations	\$ 921,553	\$ 585,000	\$ 518,786	178%

8.7%

4.6%

4.1%



	Forecast	Goal
Operating Margin	4.1%	3%
Debt Service Coverage	2.08	1.25
Days Cash on Hand	318	90
Building Payment %	3.8%	20%

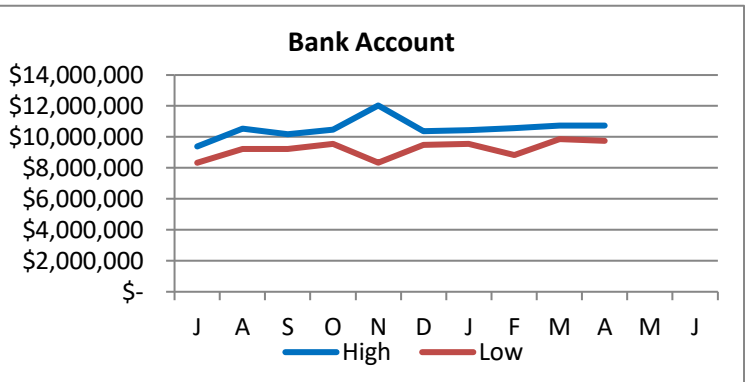
Cash Reserve	Operating Margin
\$0-\$300,000	5%
\$300,000-\$500,000	4%
\$500,000-and above	3%

CASH

RESERVES

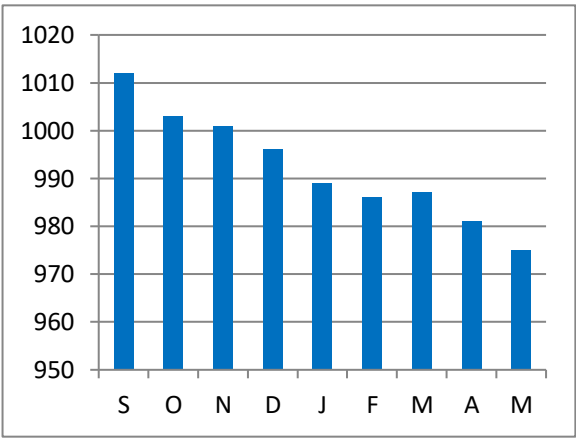
ENROLLMENT

Ending Cash Balance	\$ 10,717,498
Days Cash on Hand	318



	Actual Ytd	Forecast
Last Year Reserve Balance	\$ 10,722,872	\$ 10,722,872
Reserves Added this Year	\$ 921,553	\$ 518,786
Expenses from Reserves	\$ -	\$ -
New Reserve Balance	\$ 11,644,425	\$ 11,241,658

	S	O	N	D	J	F	M	A	M
K	108	108	108	108	108	107	108	108	106
1	103	102	102	102	98	98	99	99	98
2	108	108	108	108	108	108	108	108	108
3	108	108	108	108	108	108	107	106	106
4	107	107	107	106	106	106	105	103	102
5	106	106	105	105	105	105	105	105	105
6	105	105	105	103	103	103	103	103	103
7	102	100	99	99	98	98	98	97	97
8	82	80	80	78	77	75	76	75	75
9	83	79	79	79	78	78	78	77	75
Total	1012	1003	1001	996	989	986	987	981	975



Actuals as of: **April 30, 2026** Percentage of Year: **83.3%**

Budget Detail Report



	(1,010 Students)	(1,002 Students)	(1,008 Students)
	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget
Revenue			
1000 Local			
1510 Interest on Investments	\$ 446,947	\$ 341,547	\$ 400,000
1610 Sales to Students	\$ 214,046	\$ 199,657	\$ 200,000
1620 Sales to Adults	\$ 5,852	\$ 5,662	\$ 5,000
1720 Sales (Spiritwear, SC Sweaters, Kindness)	\$ -	\$ 3,699	\$ -
1743 Curricular Activity Fees	\$ 42,245	\$ 27,422	\$ -
1745 Co-Curricular Activity Fees	\$ 5,455	\$ -	\$ -
1747 Extra-Curricular Activity Fees	\$ 32,528	\$ 37,825	\$ 30,000
1760 Library / IT Repairs	\$ -	\$ 2,983	\$ -
1910 Rentals	\$ 17,446	\$ 13,469	\$ 15,000
1920 Donations and Contributions	\$ 67,653	\$ 66,694	\$ 50,000
1990 Field Trips / Classroom	\$ 9,875	\$ 25,498	\$ 5,000
1990 Miscellaneous	\$ 27,955	\$ 13,549	\$ 20,000
Total 1000:	\$ 870,002	\$ 738,005	\$ 725,000
3000 State			
3010 Regular School Prgm K-12	\$ 4,163,991	\$ 3,607,561	\$ 4,227,615
3020 Professional Staff	\$ 272,277	\$ -	\$ -
3105 Special Education -- Add-On	\$ 1,039,178	\$ 876,989	\$ 1,016,382
3110 Special Education -- Self-Contained	\$ 44,191	\$ 34,947	\$ 41,936
3120 Special Education -- Extended Year	\$ 5,032	\$ 4,166	\$ 5,000
3125 Special Education -- State Program	\$ 13,927	\$ 13,035	\$ 15,642
3178 Special Education -- Extended Year Stipend	\$ -	\$ 2,210	\$ -
3101 CTE - CCA	\$ 6,342	\$ -	\$ 6,000
3101 Class Size Reduction - K-8	\$ 384,599	\$ 333,513	\$ 400,182
3144 Enhancement for At-Risk Students	\$ 153,886	\$ 116,846	\$ 160,049
3200 CS Funding Base Program	\$ 116,150	\$ 96,083	\$ 115,920
3310 Flexible Allocation	\$ 2,648	\$ 322,082	\$ 386,517
3219 Charter School Local Replacement	\$ 3,350,170	\$ 3,031,194	\$ 3,657,024
3451 Educator Professional Time	\$ 102,483	\$ 107,250	\$ 107,559
3459 Schl-Based Ed Support Prof Stipends	\$ -	\$ 54,090	\$ 66,332
3407 Was TSSP, now SSHiNE	\$ 23,963	\$ 30,613	\$ 36,735
3468 Teacher Materials and Supplies	\$ 18,716	\$ 18,956	\$ 18,716
3476 Educator Salary Adjustment	\$ 567,230	\$ 547,332	\$ 651,828
3520 School LAND Trust Program	\$ 150,331	\$ 156,722	\$ 156,722
3578 Teacher and Student Success Act (TSSA)	\$ 285,141	\$ 272,368	\$ 326,841
3670 Competency Based Learning Amendments	\$ 97,209	\$ -	\$ 30,000
3815 School Fees Amendments	\$ 13,788	\$ 13,788	\$ -
3821 Grants for Professional Learning (LETRS)	\$ 8,782	\$ 4,639	\$ -
3873 Substance Prevention	\$ -	\$ 4,000	\$ -
3874 Suicide Prevention	\$ -	\$ 1,000	\$ -
3873 State Liquour Tax (NSLP)	\$ 126,835	\$ 74,391	\$ 50,000
3818 K3 Reading Software Licenses	\$ 26,322	\$ -	\$ -
3914 School Safety Grant	\$ 121,060	\$ -	\$ -
3914 School Safety Stipend	\$ 3,000	\$ -	\$ 3,000
Total 3000:	\$ 11,097,251	\$ 9,723,775	\$ 11,480,000
4000 Federal			
4522 IDEA Preschool	\$ 3,501	\$ -	\$ 3,500
4524 IDEA Part-B	\$ 164,615	\$ -	\$ 165,000
4560 NSLP Lunch Programs	\$ 181,199	\$ 140,526	\$ 165,000
4801 Title IA	\$ 28,063	\$ -	\$ 27,000
4860 Title IIA	\$ 9,483	\$ -	\$ 9,500
4805 Title IV	\$ 10,000	\$ -	\$ 10,000
Total 4000:	\$ 396,861	\$ 140,526	\$ 380,000
Total Revenue:	\$ 12,364,114	\$ 10,602,306	\$ 12,585,000

	(1,002 Students)	% of
Variance	FY26 Forecast	Forecast
\$ -	\$ 400,000	85.4%
\$ 15,000	\$ 215,000	92.9%
\$ 662	\$ 5,662	100.0%
\$ 3,699	\$ 3,699	100.0%
\$ -	\$ 27,422	100.0%
\$ -	\$ -	#DIV/0!
\$ 7,825	\$ 37,825	100.0%
\$ 2,983	\$ 2,983	100.0%
\$ -	\$ 15,000	89.8%
\$ 16,694	\$ 66,694	100.0%
\$ 20,498	\$ 25,498	100.0%
\$ -	\$ 20,000	67.7%
\$ 67,361	\$ 819,783	90.0%
\$ 100,238	\$ 4,327,853	83.4%
\$ -	\$ -	#DIV/0!
\$ 36,005	\$ 1,052,387	83.3%
\$ -	\$ 41,936	83.3%
\$ -	\$ 5,000	83.3%
\$ -	\$ 15,642	83.3%
\$ 2,210	\$ 2,210	100.0%
\$ -	\$ 6,000	0.0%
\$ 7	\$ 400,189	83.3%
\$ (22,037)	\$ 138,012	84.7%
\$ (690)	\$ 115,230	83.4%
\$ 23	\$ 386,540	83.3%
\$ (21,768)	\$ 3,635,256	83.4%
\$ (309)	\$ 107,250	100.0%
\$ (12,242)	\$ 54,090	100.0%
\$ -	\$ 36,735	83.3%
\$ 240	\$ 18,956	100.0%
\$ 4,970	\$ 656,798	83.3%
\$ -	\$ 156,722	100.0%
\$ -	\$ 326,841	83.3%
\$ (30,000)	\$ -	#DIV/0!
\$ 13,788	\$ 13,788	100.0%
\$ 4,639	\$ 4,639	100.0%
\$ 4,000	\$ 4,000	100.0%
\$ 1,000	\$ 1,000	100.0%
\$ 45,000	\$ 95,000	78.3%
\$ -	\$ -	#DIV/0!
\$ -	\$ -	#DIV/0!
\$ -	\$ 3,000	0.0%
\$ 125,074	\$ 11,605,074	83.8%
\$ -	\$ 3,500	0.0%
\$ -	\$ 165,000	0.0%
\$ -	\$ 165,000	85.2%
\$ -	\$ 27,000	0.0%
\$ -	\$ 9,500	0.0%
\$ -	\$ 10,000	0.0%
\$ -	\$ 380,000	37.0%
\$ 192,435	\$ 12,804,857	82.8%

Dress Down
General Fundraising
Cookie Dough
Fundraiser

Class 20.6k
5K \$500
POQA \$135

\$3,628 per student x
Oct 1st student count
July allot based 1,008

\$10,350 Gross pay
portion per tchr
\$13,450 per CACTUS
FTE (for FICA/401k)

FY24 \$200,000
Received \$92,339.94
\$97,209 8/31
\$10,451 left

FY24 \$427,691 all
received
FY25 \$121,540
received 121,060 8/31

FY25 \$26,322 not
received 7/31

FY25 \$3,000,
received 8/31

	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget	Variance	FY26 Forecast	% of Forecast	
Expenses							
100 Salaries							
121 Director & Principals	\$ 432,502	\$ 276,962	\$ 505,000	\$ (112,573)	\$ 392,427	70.6%	Holiday bonus/Year-End Church Stipend Prep Period BuyOut Purchasing Agent Phone Classified Bonus Professional Time Stipends PTO Cash Out
131 K-5 Teachers	\$ 4,025,217	\$ 1,388,496	\$ 4,290,300	\$ (2,623,438)	\$ 1,666,862	83.3%	
131 6-9 Teachers	\$ -	\$ 1,268,625	\$ -	\$ 1,522,959	\$ 1,522,959	83.3%	
131 ESA HB215	\$ -	\$ 241,570	\$ -	\$ 290,000	\$ 290,000	83.3%	
131 Special Education Teachers	\$ -	\$ 296,165	\$ 400,000	\$ (44,460)	\$ 355,540	83.3%	
131 Stipends / Bonuses	\$ -	\$ 516,934	\$ -	\$ 532,200	\$ 532,200	97.1%	
132 Substitutes	\$ 103,308	\$ 103,895	\$ 100,000	\$ 3,895	\$ 103,895	100.0%	
141 Title I/Curriculum, K5 Writing, Inst Coaches	\$ -	\$ 204,816	\$ -	\$ 332,506	\$ 332,506	61.6%	
144 Counselor	\$ 49,423	\$ 30,657	\$ 55,000	\$ (18,877)	\$ 36,123	84.9%	
145 Librarian	\$ 44,121	\$ 33,677	\$ 50,000	\$ (7,461)	\$ 42,539	79.2%	
152 Secretarial and Office	\$ 135,411	\$ 141,921	\$ 190,000	\$ 15,954	\$ 205,954	68.9%	
161 Paraeducators	\$ 1,419,685	\$ 757,333	\$ 685,000	\$ 474,763	\$ 1,159,763	65.3%	
161 SpEd Aides	\$ -	\$ 206,174	\$ 310,000	\$ -	\$ 310,000	66.5%	
191 Food Service	\$ 215,816	\$ 167,022	\$ 216,000	\$ 2,195	\$ 218,195	76.5%	
184 Admin Technology	\$ 86,002	\$ 68,473	\$ 74,500	\$ 13,191	\$ 87,691	78.1%	
182 Custodial & Maintenance	\$ 39,853	\$ 48,513	\$ 50,000	\$ 18,384	\$ 68,384	70.9%	
Total 100:	\$ 6,551,338	\$ 5,751,233	\$ 6,925,800	\$ 399,238	\$ 7,325,038	78.5%	
200 Benefits							
220 FICA (Social Security & Medicare)	\$ 489,220	\$ 451,003	\$ 508,000	\$ 48,703	\$ 556,703	81.0%	paid 8/25 last year?
230 Retirement / Other Employee Benefits 290	\$ 371,771	\$ 391,252	\$ 395,000	\$ -	\$ 395,000	99.1%	
241 Health / Life/ FSA	\$ 223,478	\$ 236,256	\$ 165,000	\$ 110,000	\$ 275,000	85.9%	
270 Worker's Compensation Fund	\$ 25,653	\$ 12,312	\$ 22,500	\$ -	\$ 22,500	54.7%	46k last yr GL .013 to start
280 Unemployment Insurance	\$ 102,285	\$ 57,808	\$ 84,500	\$ -	\$ 84,500	68.4%	
Total 200:	\$ 1,212,407	\$ 1,148,631	\$ 1,175,000	\$ 158,703	\$ 1,333,703	86.1%	
300 Prof & Technical Services							
320 Professional Educational Services	\$ -	\$ 7,250	\$ -	\$ 7,250	\$ 7,250	100.0%	Arbiter (Referees) Maturation
320 Special Education Services	\$ 191,450	\$ 161,374	\$ 250,000	\$ (60,000)	\$ 190,000	84.9%	
330 Employee Training	\$ 39,957	\$ 45,621	\$ 25,000	\$ 25,000	\$ 50,000	91.2%	Audit \$11.5 Payroll \$16k
340 Other Professional Services / Audit	\$ 54,924	\$ 39,458	\$ 50,000	\$ (10,000)	\$ 40,000	98.6%	
345 Business Services	\$ 424,215	\$ 217,122	\$ 500,000	\$ (226,600)	\$ 273,400	79.4%	AW 140k - 180k Red Apple 15k one time 9.8k monthly
349 Legal Services	\$ -	\$ 5,952	\$ -	\$ 20,000	\$ 20,000	29.8%	
350 Technology Services	\$ 110,883	\$ 80,537	\$ 145,000	\$ (25,000)	\$ 120,000	67.1%	
Total 300:	\$ 821,429	\$ 557,314	\$ 970,000	\$ (269,350)	\$ 700,650	79.5%	Apex Install & Monthly Monitoring: \$27k total
400 Purchased Property Services							
411 Water / Sewage / Garbage	\$ 32,669	\$ 27,820	\$ 50,000	\$ -	\$ 50,000	55.6%	Williams Scotsman - \$59k Storage Star Hooper \$2.4k 7/9 Utah Inflatables - 5k
430 Repairs & Maintenance	\$ 83,645	\$ 73,860	\$ 65,000	\$ 15,000	\$ 80,000	92.3%	
434 Snow Removal & Lawn Care	\$ 39,161	\$ 15,203	\$ 40,000	\$ -	\$ 40,000	38.0%	
441 Rental of Land & Buildings (Portables)	\$ 25,326	\$ 66,517	\$ 75,000	\$ 3,000	\$ 78,000	85.3%	De Lage Landen \$3.4k First Citizens Bank \$2,442.80 + \$681 (Monthly) Peac Solutions \$4k
443 Lease of Copy Machines	\$ 4,889	\$ 36,573	\$ 20,000	\$ 28,000	\$ 48,000	76.2%	
450 Construction Services	\$ 162,498	\$ 20,000	\$ 100,000	\$ -	\$ 100,000	20.0%	
490 Other Purchased Property Services	\$ 10,432	\$ -	\$ 30,000	\$ (30,000)	\$ -	#DIV/0!	
Total 400:	\$ 358,620	\$ 239,973	\$ 380,000	\$ 16,000	\$ 396,000	60.6%	

	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget	Variance	FY26 Forecast	% of Forecast	
500 Other Purchase Services							
513 Student Transportation / Commercial	\$ 17,935	\$ 1,733	\$ 15,000	\$ (12,000)	\$ 3,000	57.8%	
518 Field Trips	\$ 14,929	\$ 11,087	\$ 7,500	\$ 12,000	\$ 19,500	56.9%	
521 Property Insurance	\$ 15,570	\$ 22,770	\$ 25,000	\$ (2,230)	\$ 22,770	100.0%	
522 Liability Insurance	\$ 17,820	\$ 17,850	\$ 25,000	\$ (7,150)	\$ 17,850	100.0%	
530 Communication (telephone & other)	\$ 14,759	\$ 14,660	\$ 15,000	\$ 2,000	\$ 17,000	86.2%	
540 Marketing	\$ 354	\$ -	\$ 5,000	\$ (4,500)	\$ 500	0.0%	SOEP
561 Student Tuition to other LEAs	\$ 2,435	\$ 300	\$ 1,500	\$ -	\$ 1,500	20.0%	
580 Travel / Per Diem	\$ 15,300	\$ 2,173	\$ 6,000	\$ -	\$ 6,000	36.2%	
Total 500:	\$ 99,102	\$ 70,573	\$ 100,000	\$ (11,880)	\$ 88,120	80.1%	
600 Supplies and Materials							
610 Classroom	\$ 235,861	\$ 147,983	\$ 300,000	\$ (100,000)	\$ 200,000	74.0%	
610 Special Education Supplies	\$ -	\$ 2,369	\$ -	\$ 2,369	\$ 2,369	100.0%	Items intended for last year, paid for on 8/26
610 Furniture and Fixtures	\$ 65,293	\$ 38,150	\$ 15,000	\$ 23,500	\$ 38,500	99.1%	
610 Student Appreciation	\$ -	\$ 2,079	\$ -	\$ 5,000	\$ 5,000	41.6%	
610 Staff Appreciation	\$ -	\$ 31,267	\$ -	\$ 35,000	\$ 35,000	89.3%	
610 Office / Admin Supplies	\$ -	\$ 17,730	\$ -	\$ 18,000	\$ 18,000	98.5%	
630 Food - NSLP	\$ 370,219	\$ 340,867	\$ 375,000	\$ -	\$ 375,000	90.9%	
630 Food - Not NSLP	\$ 11,289	\$ 19,287	\$ -	\$ 20,000	\$ 20,000	96.4%	
621 Natural Gas	\$ 17,547	\$ 16,891	\$ 45,000	\$ (20,000)	\$ 25,000	67.6%	
622 Electricity	\$ 72,259	\$ 57,697	\$ 85,000	\$ -	\$ 85,000	67.9%	
641 Textbooks & Curriculum	\$ 188,940	\$ 161,584	\$ 200,000	\$ -	\$ 200,000	80.8%	
644 Library Books & Materials	\$ 3,884	\$ 5,389	\$ 2,500	\$ 3,000	\$ 5,500	98.0%	
650 Technology Related Supplies	\$ 185,977	\$ 273,117	\$ 300,000	\$ (23,000)	\$ 277,000	98.6%	
670 IT Software / Library / SpEd Embrace	\$ 42,178	\$ 58,609	\$ 50,000	\$ 10,000	\$ 60,000	97.7%	
680 Maintenance & Janitorial	\$ 29,995	\$ 29,465	\$ 35,000	\$ -	\$ 35,000	84.2%	
Total 600:	\$ 1,223,442	\$ 1,202,484	\$ 1,407,500	\$ (26,131)	\$ 1,381,369	87.1%	
700 Property, Equipment							
710 Land and Site Improvements	Cameras and Safety Grant \$121,060 \$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	
733 Furniture and Fixtures	\$ 39,102	\$ 2,126	\$ -	\$ 2,200	\$ 2,200	96.6%	
734 Technology Related Hardware	\$ 142,269	\$ 37,291	\$ -	\$ 37,291	\$ 37,291	100.0%	
739 NSLP Equipment & Furniture	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	
740 Cap Ex (Savings)	\$ -	\$ -	\$ 200,000	\$ -	\$ 200,000	0.0%	
Total 700:	\$ 181,371	\$ 39,417	\$ 200,000	\$ 39,491	\$ 239,491	16.5%	
800 Debt Service and Misc							
810 Dues and Fees	\$ 40,691	\$ 19,972	\$ 60,000	\$ (20,000)	\$ 40,000	49.9%	Quickbooks Payroll Expenses moved to 345.24 Payroll Expense -\$7,970
830 Interest	\$ 493,300	\$ 401,256	\$ 481,700	\$ -	\$ 481,700	83.3%	
840 Redemption of Principal	\$ 290,000	\$ 249,900	\$ 300,000	\$ -	\$ 300,000	83.3%	
830 Lease Interest & Principal	\$ 87,768	\$ -	\$ -	\$ -	\$ -	#DIV/0!	
850 Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!	
Total 800:	\$ 911,759	\$ 671,128	\$ 841,700	\$ (20,000)	\$ 821,700	81.7%	
Total Expenses:	\$ 11,359,468	\$ 9,680,753	\$ 12,000,000	\$ 286,071	\$ 12,286,071	78.8%	
Net Income:	\$ 1,004,646	\$ 921,553	\$ 585,000	\$ (93,636)	\$ 518,786	177.6%	
				3% Goal	\$ 384,146		

Fraud Risk Assessment

Continued

*Total Points Earned: ____/395 *Risk Level: Very Low Low Moderate High Very High
 > 355 316-355 276-315 200-275 < 200

	Yes	Pts
1. Does the entity have adequate basic separation of duties or mitigating controls as outlined in the attached Basic Separation of Duties Questionnaire?	200	200
2. Does the entity have governing body adopted written policies in the following areas:		
a. Conflict of interest?	5	5
b. Procurement?	5	5
c. Ethical behavior?	5	5
d. Reporting fraud and abuse?	5	5
e. Travel?	5	5
f. Credit/Purchasing cards (where applicable)?	5	5
g. Personal use of entity assets?	5	5
h. IT and computer security?	5	5
i. Cash receipting and deposits?	5	5
3. Does the entity have a licensed or certified (CPA, CGFM, CMA, CIA, CFE, CGAP, CPFO) expert as part of its management team?	20	20
a. Do any members of the management team have at least a bachelor's degree in accounting?	10	10
4. Are employees and elected officials required to annually commit in writing to abide by a statement of ethical behavior?		20
5. Have all governing body members completed entity specific (District Board Member Training for local/special service districts & interlocal entities, Introductory Training for Municipal Officials for cities & towns, etc.) online training (training.auditor.utah.gov) within four years of term appointment/election date?	20	20
6. Regardless of license or formal education, does at least one member of the management team receive at least 40 hours of formal training related to accounting, budgeting, or other financial areas each year?	20	20
7. Does the entity have or promote a fraud hotline?	20	20
8. Does the entity have a formal internal audit function?		20
9. Does the entity have a formal audit committee?	20	20

*Entity Name: QUEST ACADEMY

*Completed for Fiscal Year Ending: 6/30/2026 *Completion Date: _____

*CAO Name: Dave Bullock *CFO Name: Brett Greenwell

*CAO Signature: _____ *CFO Signature: _____

*Required

May 5, 2026

#109273

Board of Directors
Quest Academy
4862 W 4000 S
West Haven, UT 84401

This document constitutes a statement of work ("SOW") under the most recently executed Master Services Agreement ("MSA"), made by and between Eide Bailly LLP ("Eide Bailly", "we," "us," and "our") and Quest Academy ("School," "Client," "you," "your," or "the entity"). We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services Eide Bailly will provide for the entity as of and for the year ended June 30, 2026.

Ken Jeppesen is responsible for the audit services specified in this letter. These responsibilities include supervising services performed as part of this engagement and signing or authorizing another qualified firm representative to sign the audit report.

Scope of Audit Services

Audit of the Financial Statements

We will audit the financial statements of governmental activities and major fund and the related notes to the financial statements, which collectively comprise the entity's basic financial statements.

The Governmental Accounting Standards Board (GASB) provides for certain required supplementary information (RSI) to accompany the entity's basic financial statements. The RSI will be subjected to certain limited procedures, but will not be audited.

If presented, we will also evaluate and report on the presentation of supplementary information other than RSI accompanying the financial statements in relation to the financial statements as a whole.

Audit of Major Program Compliance

In addition, we will audit the entity's compliance over major federal award programs, as necessary.

Schedule of Expenditures of Federal Awards

We will subject the schedule of expenditures of federal awards (SEFA), as necessary, to the auditing procedures applied in our audit of the basic financial statements and certain additional procedures, including comparing and reconciling the schedule to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and additional procedures in accordance with auditing standards generally accepted in the United States of America. We intend to provide an opinion on whether the schedule of expenditures of federal awards is presented fairly in all material respects in relation to the financial statements as a whole.

Audit Objectives

Our audits will be conducted with the objectives of our expressing an opinion on each opinion unit and an opinion on compliance regarding the entity's major federal award programs, as necessary. The objectives of our audit of the financial statements are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (GAAS) and in accordance with *Government Auditing Standards*, and/or any state or regulatory audit requirements will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

The objectives of our compliance audit are to obtain sufficient appropriate audit evidence to form an opinion and report at the level specified in the governmental audit requirement about whether the entity complied in all material respects with the applicable compliance requirements and identify audit and reporting requirements specified in the governmental audit requirement that are supplementary to GAAS and *Government Auditing Standards*, if any, and perform procedures to address those requirements.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that certain information be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board (GASB), who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the following required supplementary information (RSI) in accordance with auditing standards generally accepted in the United States of America, for which we will not express an opinion or provide any form of assurance.

- Management's Discussion and Analysis
- Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – General Fund
- Schedule of Proportionate Share of Net Pension Liability, As Necessary
- Schedule of Contributions, As Necessary
- Notes to Required Supplementary Information, As Necessary

Supplementary Information other than RSI

Supplementary information other than RSI will accompany the School's basic financial statements, as necessary. We will subject the following supplementary information to the auditing procedures applied in our audit of the basic financial statements and certain additional procedures, including comparing and reconciling the supplementary information to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and additional procedures in accordance with auditing standards generally accepted in the United States of America. We intend to provide an opinion on the following supplementary information in relation to the basic financial statements as a whole:

- Schedule of Expenditures of Federal Awards
- Notes to Schedule of Expenditures of Federal Awards
- Schedule of Findings and Questioned Costs

Auditor Responsibilities, Procedures, and Limitations

We will conduct our audit in accordance with GAAS, the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States of America; the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance), and, if applicable, in accordance with any state or regulatory audit requirements, as necessary.

As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of the system of internal control in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing concerning any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS, *Government Auditing Standards* of the Comptroller General of the United States of America and/or state or regulatory audit requirements. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential.

Audit of Major Program Compliance, As Necessary

Our audit of your major federal award program(s) compliance will be conducted in accordance with the requirements of the Single Audit Act, as amended; and the provisions the Uniform Guidance; and will include tests of accounting records, a determination of major programs in accordance the Uniform Guidance, and other procedures we consider necessary to enable us to express such an opinion on major federal award program compliance and to render the required reports. We cannot provide assurance that

an unmodified opinion on compliance will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion or withdraw from the engagement.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether material noncompliance with applicable laws and regulations, the provisions of contracts and grant agreements applicable to major federal award programs, and the applicable compliance requirements occurred, whether due to fraud or error, and express an opinion on the entity's compliance based on the audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the entity's compliance with the requirements of the federal programs as a whole.

As part of a compliance audit in accordance with GAAS, *Government Auditing Standards* of the Comptroller General of the United States of America, and/or any state or regulatory audit requirements, we exercise professional judgment and maintain professional skepticism throughout the audit. We also identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks.

Our procedures will consist of determining major federal programs and performing the applicable procedures described in the U.S. Office of Management and Budget *OMB Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of the entity's major programs and performing such other procedures as we considers necessary in the circumstances. The purpose of those procedures will be to express an opinion on the entity's compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

Also, as required by the Uniform Guidance, we will obtain an understanding of the entity's internal control over compliance relevant to the audit in order to design and perform tests of controls to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each of the entity's major federal award programs. Our tests will be less in scope than would be necessary to render an opinion on these controls and, accordingly, no opinion will be expressed in our report. However, we will communicate to you regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we have identified during the audit.

We will issue a report on compliance that will include an opinion or disclaimer of opinion regarding the entity's major federal award programs, and a report on internal controls over compliance that will report any significant deficiencies and material weaknesses identified; however, such report will not express an opinion on internal control.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Management Responsibilities

Our audit will be conducted on the basis that management and, when appropriate, those charged with governance, acknowledge and understand that they have responsibility:

- a. For the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America;
- b. For the design, implementation, and maintenance of the system of internal control relevant to the preparation and fair presentation of basic financial statements that are free from material misstatement, whether due to error fraudulent financial reporting, misappropriation of assets, or violations of laws, governmental regulations, grant agreements, or contractual agreements;
- c. For identifying, in its accounts, all federal awards received and expended during the period and the federal programs under which they were received;
- d. For maintaining records that adequately identify the source and application of funds for federally funded activities;
- e. For preparing the schedule of expenditures of federal awards (including notes and noncash assistance received) in accordance with the Uniform Guidance requirements;
- f. For designing, implementing, and maintaining effective internal control over federal awards that provides reasonable assurance that the entity is managing federal awards in compliance with federal statutes, regulations, and the terms and conditions of the federal awards;
- g. For identifying and ensuring that the entity complies with federal laws, statutes, regulations, rules, provisions of contracts or grant agreements, and the terms and conditions of federal award programs and implementing systems designed to achieve compliance with applicable federal statutes, regulations, and the terms and conditions of federal award programs;
- h. For disclosing accurately, currently, and completely the financial results of each federal award in accordance with the requirements of the award;
- i. For identifying and providing report copies of previous audits, attestation engagements, or other studies that directly relate to the objectives of the audit, including whether related recommendations have been implemented;
- j. For taking prompt action when instances of noncompliance are identified;
- k. For addressing the findings and recommendations of auditors, for establishing and maintaining a process to track the status of such findings and recommendations and taking corrective action on reported audit findings from prior periods and preparing a summary schedule of prior audit findings;
- l. For following up and taking corrective action on current year audit findings and preparing a corrective action plan for such findings;
- m. For submitting the reporting package and data collection form to the appropriate parties;
- n. For making the auditor aware of any significant contractor relationships where the contractor is responsible for program compliance;
- o. To provide us with:
 - i. Access to all information of which management is aware that is relevant to the preparation and fair presentation of the financial statements, including the disclosures, such as records, documentation, and other matters;
 - ii. Additional information that we may request from management for the purpose of the audit;
 - iii. Unrestricted access to persons within the entity and others from whom we determine it necessary to obtain audit evidence;
- p. For identifying and ensuring that the entity complies with the laws and regulations applicable to its activities;
- q. For adjusting the basic financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the current period under audit are immaterial, both individually and in the aggregate, to the financial statements as a whole;

- r. For acceptance of nonattest services, including identifying the proper party to oversee nonattest work;
- s. For maintaining adequate records, selecting and applying accounting principles, and safeguarding assets.
- t. For informing us of any known or suspected fraud affecting the entity involving management, employees with significant role in the system of internal control and others where fraud could have a material effect on the financials; and
- u. For the accuracy and completeness of all information provided.
- v. If applicable, for including the auditor's report in any document containing financial statements that indicates that such financial statements have been audited by us, including:
 - i. A written acknowledgement of all the documents that management expects to issue that will be included in the annual report and the planned timing and method of issuance of that annual report; and
 - ii. A final version of the annual report (including all the documents that, together, comprise the annual report) in a timely manner prior to the date of the auditor's report.

With regard to the schedule of expenditures of federal awards referred to above, you acknowledge and understand your responsibility (a) for the preparation of the schedule of expenditures of federal awards in accordance with the applicable criteria, (b) to provide us with the appropriate written representations regarding the schedule of expenditures of federal awards, (c) to include our report on the schedule of expenditures of federal awards in any document that contains the supplementary information and that indicates that we have reported on such schedule, and (d) to present the schedule of expenditures of federal awards with the audited financial statements, or if the schedule of expenditures of federal awards will not be presented with the audited financial statements, to make the audited financial statements readily available to the intended users of the schedule no later than the date of issuance by you of the supplementary information and our report thereon.

With regard to the supplementary information referred to above, you acknowledge and understand your responsibility: (a) for the preparation of the supplementary information in accordance with the applicable criteria; (b) to provide us with the appropriate written representations regarding supplementary information; (c) to include our report on the supplementary information in any document that contains the supplementary information and that indicates that we have reported on such supplementary information; and (d) to present the supplementary information with the audited basic financial statements, or if the supplementary information will not be presented with the audited basic financial statements, to make the audited basic financial statements readily available to the intended users of the supplementary information no later than the date of issuance by you of the supplementary information and our report thereon.

Management agrees they are responsible for the distribution of reports issued in conjunction with this engagement to those charged with governance, entity officials, oversight bodies, or other organizations requiring audits, as applicable.

As part of our audit process, we will request from management and, when appropriate, those charged with governance, written confirmation concerning representations made to us in connection with the audit.

Responsibilities and Limitations Related to Nonattest Services

For all nonattest services we may provide to you, management agrees to assume all management responsibilities for (a) making all management decisions and performing all management functions; (b) assigning a competent individual to oversee the services; (c) evaluating the adequacy of the services performed; (d) evaluating and accepting responsibility for the results of the services performed; and (e) designing, implementing, and maintaining the system of internal control, including the process used to monitor the system of internal control.

We will provide the following nonattest services:

- Prepare or assist with the preparation of your financial statements and the related notes.
- Prepare or assist in preparing the government-wide statements and conversion entries and note disclosures.
- Preparation of federal and state income tax returns
- Prepare or assist with the preparation of the schedule of expenditures for federal awards, as necessary.
- Completion of the Auditee's portion of the Data Collection Form, as necessary.
- Maintenance of depreciation schedules

Our responsibilities and limitations of the nonattest services are as follows:

- We will perform the services in accordance with applicable professional standards.
- The nonattest services are limited to the services previously outlined above. Our firm, in its sole professional judgment, reserves the right to refuse to do any procedure or take any action that could be construed as making management decisions or assuming management responsibilities.

You are also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

Reporting

We will issue a written report upon completion of our audit of your financial statements. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial statements, we retain the right to take any course of action permitted by professional standards, including declining to express an opinion or issue a report, or withdrawing from the engagement.

In accordance with the requirements of *Government Auditing Standards*, we will also issue a written report describing the scope of our testing over internal control over financial reporting and over compliance with laws, regulations, and provisions of grants and contracts, including the results of that testing. However, providing an opinion on internal control and compliance over financial reporting will not be an objective of the audit and, therefore, no such opinion will be expressed.

Data Collection Form

Prior to the completion of our engagement, we will complete the sections of the Data Collection Form that are our responsibility, as necessary. The form will summarize our audit findings, amounts and conclusions. It is management's responsibility to submit a reporting package including financial statements, schedule of expenditure of federal awards, summary schedule of prior audit findings and corrective action plan along with the Data Collection Form to the Federal Audit Clearinghouse. The financial reporting package must be text searchable, unencrypted, and unlocked. Otherwise, the reporting package will not be accepted by the Federal Audit Clearinghouse. We will assist you in the electronic submission and certification. You may request from us copies of our report for you to include with the reporting package submitted to pass-through entities.

The Data Collection Form is required to be submitted within the earlier of 30 days after receipt of our auditors' reports or nine months after the end of the audit period, unless specifically waived by a federal cognizant or oversight agency for audits. Data Collection Forms submitted untimely are one of the factors in assessing programs at a higher risk.

Engagement Administration and Other Matters

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. Details of information we expect to need for our audit and the dates required will be provided separately. You agree to share all facts that may affect your financial statements, even if you first become aware of those facts after the date of the auditor's report but before the date your financial statements are issued.

Government Auditing Standards require that we provide, upon request, a copy of our most recent external peer review report and any subsequent review reports to the party contracting for the audit. Accordingly, we will provide a copy of our most recent peer review report at your request.

Eide Bailly LLP has owners that are not licensed as certified public accountants as permitted under Section 5079 of the California Business Code. The nature of the services to be provided in conjunction with this engagement are such that non-licensee owners may be involved in performing our services.

Engagement Fees

Our fees are based on the amount of time required at various levels of responsibility. We estimate that our fee for the financial statement audit and state compliance procedures will be \$15,750. If a Single Audit is required, these fees will be billed separately. A service charge of 1% per month, which is an annual rate of 12%, will be added to all accounts unpaid 30 days after billing date.

The ability to perform and complete our engagement consistent with the estimated fee included above depends upon the quality of your underlying accounting records and the timeliness of your personnel in providing information and responding to our requests. To assist with this process, we will provide you with an itemized request list that identifies the information you will need to prepare and provide in preparation for our engagement, as well as the requested delivery date for those items. A lack of preparation, including not providing this information in an accurate and timely manner, unanticipated audit adjustments, and/or untimely assistance by your personnel may result in an increase in our fees and/or a delay in the completion of our engagement.

We will advise you if unexpected circumstances require significant additional procedures resulting in a substantial increase in the fee estimate.

Changes in Professional Standards

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the SOW increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

Use of Financial Statements

Should you decide to include or incorporate by reference these financial statements and our auditors' report thereon in a future private placement or other offering of equity or debt securities, you agree that we are under no obligation to reissue our report or provide consent for the use of our report in such a

registration or offering document. We will determine, at our sole discretion, whether we will reissue our report or provide consent for the use of our report only after we have performed the procedures we consider necessary in the circumstances. If we decide to reissue our report or consent to the use of our report, we will be required to perform certain procedures including, but not limited to, (a) reading other information incorporated by reference in the registration statement or other offering document, and (b) subsequent event procedures. These procedures will be considered an engagement separate and distinct from our audit engagement, and we will bill you separately.

If we decide to reissue our report or consent to the use of our report, you agree that we will be included on each distribution of draft offering materials, and we will receive a complete set of final documents.

If we decide not to reissue our report or decide to withhold our consent to the use of our report, you may be required to engage another firm to audit periods covered by our audit reports, and that firm will likely bill you for its services. While the successor auditor may request access to our workpapers for those periods, we are under no obligation to permit such access.

Termination

The engagement contemplated by this SOW shall terminate upon the earlier of completion of the services described herein or as described in the MSA.

Agreement

We appreciate the opportunity to provide the services described in this SOW under the MSA. This SOW and the MSA constitute the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and Eide Bailly related to audit services. Please sign, date, and return this SOW to us to indicate your acknowledgment and understanding of, and agreement with, the arrangements for our audit of your financial statements including the terms of our engagement and the parties' respective responsibilities. By signing this SOW, you represent and warrant that you are authorized to sign on behalf of and bind each client and any affiliate identified herein.

Sincerely,

Eide Bailly LLP

AGREED TO AND ACCEPTED:

Name: _____

Title: _____

Date: _____

Actuals as of: **March 31, 2026** Percentage of Year: **75.0%**



Budget Detail Report

	(1,010 Students)	(1,002 Students)	(1,008 Students)		(1,002 Students)	
	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget		FY26 Forecast	% of Forecast
Revenue						
1000 Local				Variance		
1510 Interest on Investments	\$ 446,947	\$ 308,705	\$ 400,000	\$ -	\$ 400,000	77.2%
1610 Sales to Students	\$ 214,046	\$ 180,407	\$ 200,000	\$ 15,000	\$ 215,000	83.9%
1620 Sales to Adults	\$ 5,852	\$ 4,914	\$ 5,000	\$ 500	\$ 5,500	89.3%
1720 Sales (Spiritwear, SC Sweaters, Kindness)	\$ -	\$ 3,759	\$ -	\$ 3,759	\$ 3,759	100.0%
1743 Curricular Activity Fees	\$ 42,245	\$ 26,356	\$ -	\$ -	\$ 26,356	100.0%
1745 Co-Curricular Activity Fees	\$ 5,455	\$ -	\$ -	\$ -	\$ -	#DIV/0!
1747 Extra-Curricular Activity Fees	\$ 32,528	\$ 29,125	\$ 30,000	\$ -	\$ 30,000	97.1%
1760 Library / IT Repairs	\$ -	\$ 2,672	\$ -	\$ 2,672	\$ 2,672	100.0%
1910 Rentals	\$ 17,446	\$ 12,329	\$ 15,000	\$ -	\$ 15,000	82.2%
1920 Donations and Contributions	\$ 67,653	\$ 66,694	\$ 50,000	\$ 16,685	\$ 66,685	100.0%
1990 Field Trips / Classroom	\$ 9,875	\$ 25,439	\$ 5,000	\$ 20,439	\$ 25,439	100.0%
1990 Miscellaneous	\$ 27,955	\$ 13,478	\$ 20,000	\$ -	\$ 20,000	67.4%
Total 1000:	\$ 870,002	\$ 673,878	\$ 725,000	\$ 59,055	\$ 810,411	83.2%
3000 State						
3010 Regular School Prgm K-12	\$ 4,163,991	\$ 3,248,272	\$ 4,227,615	\$ 100,238	\$ 4,327,853	75.1%
3020 Professional Staff	\$ 272,277	\$ -	\$ -	\$ -	\$ -	#DIV/0!
3105 Special Education -- Add-On	\$ 1,039,178	\$ 789,290	\$ 1,016,382	\$ 36,005	\$ 1,052,387	75.0%
3110 Special Education -- Self-Contained	\$ 44,191	\$ 31,452	\$ 41,936	\$ -	\$ 41,936	75.0%
3120 Special Education -- Extended Year	\$ 5,032	\$ 3,750	\$ 5,000	\$ -	\$ 5,000	75.0%
3125 Special Education -- State Program	\$ 13,927	\$ 11,731	\$ 15,642	\$ -	\$ 15,642	75.0%
3178 Special Education -- Extended Year Stipend	\$ -	\$ 2,210	\$ -	\$ 2,210	\$ 2,210	100.0%
3101 CTE - CCA	\$ 6,342	\$ -	\$ 6,000	\$ -	\$ 6,000	0.0%
3101 Class Size Reduction - K-8	\$ 384,599	\$ 300,174	\$ 400,182	\$ 7	\$ 400,189	75.0%
3144 Enhancement for At-Risk Students	\$ 153,886	\$ 106,263	\$ 160,049	\$ (22,037)	\$ 138,012	77.0%
3200 CS Funding Base Program	\$ 116,150	\$ 86,509	\$ 115,920	\$ (690)	\$ 115,230	75.1%
3310 Flexible Allocation	\$ 2,648	\$ 289,918	\$ 386,517	\$ 23	\$ 386,540	75.0%
3219 Charter School Local Replacement	\$ 3,350,170	\$ 2,729,163	\$ 3,657,024	\$ (21,768)	\$ 3,635,256	75.1%
3451 Educator Professional Time	\$ 102,483	\$ 107,250	\$ 107,559	\$ (309)	\$ 107,250	100.0%
3459 Schl-Based Ed Support Prof Stipends	\$ -	\$ 54,090	\$ 66,332	\$ (12,242)	\$ 54,090	100.0%
3407 Was TSSP, now SSHiNE	\$ 23,963	\$ 27,552	\$ 36,735	\$ -	\$ 36,735	75.0%
3468 Teacher Materials and Supplies	\$ 18,716	\$ 18,956	\$ 18,716	\$ 240	\$ 18,956	100.0%
3476 Educator Salary Adjustment	\$ 567,230	\$ 492,598	\$ 651,828	\$ 4,970	\$ 656,798	75.0%
3520 School LAND Trust Program	\$ 150,331	\$ 156,722	\$ 156,722	\$ -	\$ 156,722	100.0%
3578 Teacher and Student Success Act (TSSA)	\$ 285,141	\$ 245,131	\$ 326,841	\$ -	\$ 326,841	75.0%
3670 Competency Based Learning Amendments	\$ 97,209	\$ -	\$ 30,000	\$ (30,000)	\$ -	#DIV/0!
3800 School Fees Amendments	\$ 13,788	\$ 13,788	\$ -	\$ 13,788	\$ 13,788	100.0%
3821 Grants for Professional Learning (LETRS)	\$ 8,782	\$ 4,639	\$ -	\$ 4,639	\$ 4,639	100.0%
3873 Substance Prevention	\$ -	\$ 4,000	\$ -	\$ 4,000	\$ 4,000	100.0%
3874 Suicide Prevention	\$ -	\$ 1,000	\$ -	\$ 1,000	\$ 1,000	100.0%
3873 State Liquour Tax (NSLP)	\$ 126,835	\$ 53,796	\$ 50,000	\$ 45,000	\$ 95,000	56.6%
3818 K3 Reading Software Licenses	\$ 26,322	\$ -	\$ -	\$ -	\$ -	#DIV/0!
3914 School Safety Grant	\$ 121,060	\$ -	\$ -	\$ -	\$ -	#DIV/0!
3914 School Safety Stipend	\$ 3,000	\$ -	\$ 3,000	\$ -	\$ 3,000	0.0%
Total 3000:	\$ 11,097,251	\$ 8,778,254	\$ 11,480,000	\$ 125,074	\$ 11,605,074	75.6%
4000 Federal						
4522 IDEA Preschool	\$ 3,501	\$ -	\$ 3,500	\$ -	\$ 3,500	0.0%
4524 IDEA Part-B	\$ 164,615	\$ -	\$ 165,000	\$ -	\$ 165,000	0.0%
4560 NSLP Lunch Programs	\$ 181,199	\$ 101,375	\$ 165,000	\$ -	\$ 165,000	61.4%
4801 Title IA	\$ 28,063	\$ -	\$ 27,000	\$ -	\$ 27,000	0.0%
4860 Title IIA	\$ 9,483	\$ -	\$ 9,500	\$ -	\$ 9,500	0.0%
4805 Title IV	\$ 10,000	\$ -	\$ 10,000	\$ -	\$ 10,000	0.0%
Total 4000:	\$ 396,861	\$ 101,375	\$ 380,000	\$ -	\$ 380,000	26.7%
Total Revenue:	\$ 12,364,114	\$ 9,553,507	\$ 12,585,000	\$ 184,129	\$ 12,795,485	74.7%

	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget	Variance	FY26 Forecast	% of Forecast
Expenses						
100 Salaries						
121 Director & Principals	\$ 432,502	\$ 305,270	\$ 505,000	\$ (112,573)	\$ 392,427	77.8%
131 K-5 Teachers	\$ 4,025,217	\$ 1,250,147	\$ 4,290,300	\$ (2,623,438)	\$ 1,666,862	75.0%
131 6-9 Teachers	\$ -	\$ 1,142,219	\$ -	\$ 1,522,959	\$ 1,522,959	75.0%
131 ESA HB215	\$ -	\$ 217,500	\$ -	\$ 290,000	\$ 290,000	75.0%
Raises						
131 Special Education Teachers	\$ -	\$ 266,655	\$ 400,000	\$ (44,460)	\$ 355,540	75.0%
131 Stipends / Bonuses	\$ -	\$ 466,082	\$ -	\$ 600,000	\$ 600,000	77.7%
132 Substitutes	\$ 103,308	\$ 95,373	\$ 100,000	\$ -	\$ 100,000	95.4%
141 Title I/Curriculum, K5 Writing, Inst Coaches	\$ -	\$ 153,492	\$ -	\$ 332,506	\$ 332,506	46.2%
144 Counselor	\$ 49,423	\$ 27,647	\$ 55,000	\$ (18,877)	\$ 36,123	76.5%
145 Librarian	\$ 44,121	\$ 30,132	\$ 50,000	\$ (7,461)	\$ 42,539	70.8%
152 Secretarial and Office	\$ 135,411	\$ 117,772	\$ 190,000	\$ 15,954	\$ 205,954	57.2%
161 Paraeducators	\$ 1,419,685	\$ 659,259	\$ 685,000	\$ 474,763	\$ 1,159,763	56.8%
161 SpEd Aides	\$ -	\$ 206,174	\$ 310,000	\$ -	\$ 310,000	66.5%
191 Food Service	\$ 215,816	\$ 147,140	\$ 216,000	\$ 2,195	\$ 218,195	67.4%
184 Admin Technology	\$ 86,002	\$ 53,679	\$ 74,500	\$ 13,191	\$ 87,691	61.2%
182 Custodial & Maintenance	\$ 39,853	\$ 38,639	\$ 50,000	\$ 18,384	\$ 68,384	56.5%
Total 100:	\$ 6,551,338	\$ 5,177,180	\$ 6,925,800	\$ 463,143	\$ 7,388,943	70.1%
200 Benefits						
220 FICA (Social Security & Medicare)	\$ 489,220	\$ 408,231	\$ 508,000	\$ 53,560	\$ 561,560	72.7%
230 Retirement / Other Employee Benefits 290	\$ 371,771	\$ 391,252	\$ 395,000	\$ -	\$ 395,000	99.1%
241 Health / Life/ FSA	\$ 223,478	\$ 203,676	\$ 165,000	\$ 110,000	\$ 275,000	74.1%
270 Worker's Compensation Fund	\$ 25,653	\$ 7,909	\$ 22,500	\$ -	\$ 22,500	35.2%
280 Unemployment Insurance	\$ 102,285	\$ 57,808	\$ 84,500	\$ -	\$ 84,500	68.4%
Total 200:	\$ 1,212,407	\$ 1,068,876	\$ 1,175,000	\$ 163,560	\$ 1,338,560	79.9%
300 Prof & Technical Services						
320 Professional Educational Services	\$ -	\$ 3,800	\$ -	\$ 3,800	\$ 3,800	100.0%
320 Special Education Services	\$ 191,450	\$ 139,135	\$ 250,000	\$ (60,000)	\$ 190,000	73.2%
330 Employee Training	\$ 39,957	\$ 47,288	\$ 25,000	\$ 25,000	\$ 50,000	94.6%
340 Other Professional Services / Audit	\$ 54,924	\$ 34,485	\$ 50,000	\$ (10,000)	\$ 40,000	86.2%
345 Business Services	\$ 424,215	\$ 207,322	\$ 500,000	\$ (226,600)	\$ 273,400	75.8%
349 Legal Services	\$ -	\$ 5,952	\$ -	\$ 20,000	\$ 20,000	29.8%
350 Technology Services	\$ 110,883	\$ 80,127	\$ 145,000	\$ (25,000)	\$ 120,000	66.8%
Total 300:	\$ 821,429	\$ 518,109	\$ 970,000	\$ (272,800)	\$ 697,200	74.3%
400 Purchased Property Services						
411 Water / Sewage / Garbage	\$ 32,669	\$ 25,269	\$ 50,000	\$ -	\$ 50,000	50.5%
430 Repairs & Maintenance	\$ 83,645	\$ 69,924	\$ 65,000	\$ 15,000	\$ 80,000	87.4%
434 Snow Removal & Lawn Care	\$ 39,161	\$ 13,528	\$ 40,000	\$ -	\$ 40,000	33.8%
441 Rental of Land & Buildings (Portables)	\$ 25,326	\$ 58,657	\$ 75,000	\$ 3,000	\$ 78,000	75.2%
443 Lease of Copy Machines	\$ 4,889	\$ 31,732	\$ 20,000	\$ 28,000	\$ 48,000	66.1%
450 Construction Services	\$ 162,498	\$ 20,000	\$ 100,000	\$ -	\$ 100,000	20.0%
490 Other Purchased Property Services	\$ 10,432	\$ -	\$ 30,000	\$ (30,000)	\$ -	#DIV/0!
Total 400:	\$ 358,620	\$ 219,110	\$ 380,000	\$ 16,000	\$ 396,000	55.3%

	Previous Yr's Actuals	Current Yr's Actuals	Approved FY26 Budget	Variance	FY26 Forecast	% of Forecast
500 Other Purchase Services						
513 Student Transportation / Commercial	\$ 17,935	\$ 1,733	\$ 15,000	\$ (12,000)	\$ 3,000	57.8%
518 Field Trips	\$ 14,929	\$ 10,537	\$ 7,500	\$ 12,000	\$ 19,500	54.0%
521 Property Insurance	\$ 15,570	\$ 22,770	\$ 25,000	\$ (2,230)	\$ 22,770	100.0%
522 Liability Insurance	\$ 17,820	\$ 17,850	\$ 25,000	\$ (7,150)	\$ 17,850	100.0%
530 Communication (telephone & other)	\$ 14,759	\$ 13,392	\$ 15,000	\$ 2,000	\$ 17,000	78.8%
540 Marketing	\$ 354	\$ -	\$ 5,000	\$ (4,500)	\$ 500	0.0%
561 Student Tuition to other LEAs	\$ 2,435	\$ 300	\$ 1,500	\$ -	\$ 1,500	20.0%
580 Travel / Per Diem	\$ 15,300	\$ 2,173	\$ 6,000	\$ -	\$ 6,000	36.2%
<i>Total 500:</i>	<i>\$ 99,102</i>	<i>\$ 68,755</i>	<i>\$ 100,000</i>	<i>\$ (11,880)</i>	<i>\$ 88,120</i>	<i>78.0%</i>
600 Supplies and Materials						
610 Classroom	\$ 235,861	\$ 124,310	\$ 300,000	\$ (100,000)	\$ 200,000	62.2%
610 Special Education Supplies	\$ -	\$ 1,510	\$ -	\$ 2,000	\$ 2,000	75.5%
610 Furniture and Fixtures	\$ 65,293	\$ 38,150	\$ 15,000	\$ 23,500	\$ 38,500	99.1%
610 Student Appreciation	\$ -	\$ 2,079	\$ -	\$ 5,000	\$ 5,000	41.6%
610 Staff Appreciation	\$ -	\$ 31,059	\$ -	\$ 35,000	\$ 35,000	88.7%
610 Office / Admin Supplies	\$ -	\$ 15,774	\$ -	\$ 18,000	\$ 18,000	87.6%
630 Food - NSLP	\$ 370,219	\$ 299,427	\$ 375,000	\$ -	\$ 375,000	79.8%
630 Food - Not NSLP	\$ 11,289	\$ 17,273	\$ -	\$ 20,000	\$ 20,000	86.4%
621 Natural Gas	\$ 17,547	\$ 13,880	\$ 45,000	\$ (20,000)	\$ 25,000	55.5%
622 Electricity	\$ 72,259	\$ 52,200	\$ 85,000	\$ -	\$ 85,000	61.4%
641 Textbooks & Curriculum	\$ 188,940	\$ 161,584	\$ 200,000	\$ -	\$ 200,000	80.8%
644 Library Books & Materials	\$ 3,884	\$ 5,078	\$ 2,500	\$ 3,000	\$ 5,500	92.3%
650 Technology Related Supplies	\$ 185,977	\$ 73,867	\$ 300,000	\$ (23,000)	\$ 277,000	26.7%
670 IT Software / Library / SpEd Embrace	\$ 42,178	\$ 55,988	\$ 50,000	\$ 10,000	\$ 60,000	93.3%
680 Maintenance & Janitorial	\$ 29,995	\$ 26,815	\$ 35,000	\$ -	\$ 35,000	76.6%
<i>Total 600:</i>	<i>\$ 1,223,442</i>	<i>\$ 918,994</i>	<i>\$ 1,407,500</i>	<i>\$ (26,500)</i>	<i>\$ 1,381,000</i>	<i>66.5%</i>
700 Property, Equipment						
710 Land and Site Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
733 Furniture and Fixtures	\$ 39,102	\$ 2,126	\$ -	\$ 2,200	\$ 2,200	96.6%
734 Technology Related Hardware	\$ 142,269	\$ 26,934	\$ -	\$ 26,934	\$ 26,934	100.0%
739 NSLP Equipment & Furniture	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
740 Cap Ex (Savings)	\$ -	\$ -	\$ 200,000	\$ -	\$ 200,000	0.0%
<i>Total 700:</i>	<i>\$ 181,371</i>	<i>\$ 29,060</i>	<i>\$ 200,000</i>	<i>\$ 29,134</i>	<i>\$ 229,134</i>	<i>12.7%</i>
800 Debt Service and Misc						
810 Dues and Fees	\$ 40,691	\$ 35,513	\$ 60,000	\$ (20,000)	\$ 40,000	88.8%
830 Interest	\$ 493,300	\$ 361,275	\$ 481,700	\$ -	\$ 481,700	75.0%
840 Redemption of Principal	\$ 290,000	\$ 225,000	\$ 300,000	\$ -	\$ 300,000	75.0%
830 Lease Interest & Principal	\$ 87,768	\$ -	\$ -	\$ -	\$ -	#DIV/0!
850 Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	#DIV/0!
<i>Total 800:</i>	<i>\$ 911,759</i>	<i>\$ 621,788</i>	<i>\$ 841,700</i>	<i>\$ (20,000)</i>	<i>\$ 821,700</i>	<i>75.7%</i>
<i>Total Expenses:</i>	<i>\$ 11,359,468</i>	<i>\$ 8,621,872</i>	<i>\$ 12,000,000</i>	<i>\$ 340,657</i>	<i>\$ 12,340,657</i>	<i>69.9%</i>
<i>Net Income:</i>	<i>\$ 1,004,646</i>	<i>\$ 931,635</i>	<i>\$ 585,000</i>	<i>\$ (156,528)</i>	<i>\$ 454,828</i>	<i>204.8%</i>
				3% Goal	\$ 383,865	



QUEST ACADEMY

INNOVATION • PASSION • MASTERY

BOARD MEMBER STATEMENT OF ETHICAL BEHAVIOR

I commit to upholding the highest standards of ethical behavior and professional conduct. I will obey all applicable laws, as well as state and local policies. I will act with honesty, fairness, and integrity in all professional interactions, treating all individuals with respect and dignity. I will use school resources wisely and responsibly, ensuring the efficient and effective use of taxpayers' dollars.

Date _____ Board Member Signature _____

Date _____ Board Member Signature _____

Date _____ Board Member Signature _____

Date _____ Board Member Signature _____

Date _____ Board Member Signature _____

Date _____ Board Member Signature _____

Quest Academy

2026 Policy Update Package — Summary

Prepared: May 15, 2026 (for the 5/21/2026 board meeting)

The 2026 Utah General Session enacted bills affecting required state policies for charter LEAs. After review by Quest's Director and Board Chair, the package being brought to the 5/21/2026 board meeting is delivered in two companion documents:

QA_Modified_Policies.docx	QA_New_Stand_Alone_Policies.docx
Modifies 14 existing manual policies (+ Special Ed Manual coordination note) — 15 redline sections.	Adopts 12 new stand-alone policies.

Document 1 — Policies Being Modified

Policy	Why It's Changing
Absenteeism and Truancy Prevention	SB 58 requires tiered MTSS interventions, annual data accuracy review, toilet-training enrollment provision, and annual board review; HB 145 expands excused absences for parent-provided reasons if the student maintains a 2.0 GPA. (Renamed from Truancy Intervention.)
Acceptable Use / Electronic Device Use	SB 69 imposes a default ban on personal devices during all school hours; HB 44 adds AI glasses to scope; SB 88 requires obscene-material filter and parent-accessible monitoring; HB 273 requires USBE balanced-tech model adoption by 7/1/2027. (Renamed from Electronic Resources.)
Criminal Background Check / Arrest Reporting	SB 312 establishes a tiered employment-restriction framework following licensure denial, prohibits volunteers with serious-misconduct restrictions, and triggers mandatory dismissal for serious misconduct; R277-516 was repealed (citation moves to R277-214/316).
LEA-Specific Educator License	SB 312 requires application of the same tiered employment-restriction framework and mandatory dismissal for serious misconduct.
Information Technology Security / Internet Safety (CIPA)	HB 44 requires designation of a Cybersecurity Officer and 24-hour breach reporting to USBE. (Cybersecurity-specific obligations are split into a new stand-alone Cybersecurity Policy.)
Meal Charge	HB 148 requires an annual meal-debt report to USBE by June 30, 5-year recordkeeping, and refund of unused balances to families within 60 days of withdrawal/graduation.
Open Enrollment / Lottery	SB 131 adds an enrollment preference tier for students residing within the political subdivision (city or county) containing Quest's primary location; statutory citations are updated to recodified §§ 53G-6-502/503.

Policy	Why It's Changing
Religious Expression in Public Schools	SB 268 expands student religious expression protections (student-initiated prayer, religious dress, viewpoint neutrality in school-sponsored speaking, religious literature). (Renamed from Religion & Education.)
School Fees	HB 142 allows fee-waiver students to request a second waiver for a school trip when accompanied by a director-approved action plan. (Renamed from Fee Waiver.)
Student Conduct and Discipline	HB 299 requires response procedure for student arrests/charges for serious or sexual offenses; SB 167 tightens reintegration plan timeline to 7 calendar days; HB 188 codifies reasonable-belief search standard, evidence chain of custody, and e-cigarette disposal; SB 181 cross-reference to new Restraint and LRBI policy.
Student Data Privacy & Security / Data Governance	SB 296 requires a digital consent mechanism by 7/1/2027; SB 152 requires parent notice and opt-out before sharing data with Higher Education institutions; HB 55 requires 30-day termination clauses in ed-tech vendor contracts.
Health and Welfare	SB 244 moves cardiac response and AED requirements out to a new stand-alone Cardiac Emergency Response Plan policy; HB 351 requires written parent follow-up on health screening results within 10 school days.
Student Credit	HB 358 sets 1 credit = ≥83 class hours for attendance-validated programs in grades 9-12 (does not apply to competency-based, Adult Ed, course-substitution, or concurrent enrollment credit). (Renamed from Credit Evaluation.)
GRAMA	HB 147 requires an electronic-form submission option for GRAMA requests by 7/1/2027.
<i>Special Education Manual (separate document)</i>	HB 143 requires 30-day advance written notice to SPED families before boundary changes; HB 448 updates USDB partnership rules; SB 81 requires individualized interventions when assessments indicate need. (Coordination note only — actual edits are made in the SPED manual.)

Document 2 — New Policies Being Added

Policy	Why It's Being Added
Board Member Oath of Office	SB 186 made the oath of office and recordkeeping requirements explicit for charter LEAs. Oath is administered by the Board Chair or Vice Chair.
Cybersecurity Policy	HB 44 establishes discrete cybersecurity obligations (Cybersecurity Officer, minimum standards, vendor security review, 24-hour breach reporting); SB 123 extends Utah cybersecurity provisions. CSO designated as the IT Specialist (Tammy Mindrum).
Artificial Intelligence (AI) Use Policy	HB 273 requires a stand-alone AI policy addressing student/staff use, data privacy, academic integrity, and AI-literacy instruction. AI Sandbox provisions deferred until USBE releases the model policy (expected before 12/1/2026; adoption deadline 7/1/2027).
Cardiac Emergency Response Plan	SB 244 requires a stand-alone CERP with AED placement and inspection, CPR/AED training, designated response team, and annual drill.
Dyslexia Screening and Intervention	SB 81 requires universal screening and tiered interventions for all LEAs. Quest does not participate in the HB 393 optional pilot.
Noncurricular Clubs / Equal Access	SB 295 (Intellectual Diversity in Education Act) requires a viewpoint-neutral equal-access framework for student-initiated clubs, consistent with the federal Equal Access Act.
Parental, Postpartum, Adoption, and Foster Leave	HB 329 requires LEA-employee paid leave for birth, postpartum recovery, adoption, or foster placement. Quest follows the State's adopted policy on leave amount and structure.
Restraint and LRBI	SB 181 establishes restraint and seclusion standards, prohibited practices (mechanical/chemical/prone restraint), training requirements, parent notification, and documentation. Quest Academy does not use seclusion and does not maintain a seclusion room.
School Security (School Security Act)	HB 44 requires designated security officer, visitor management, wearable panic devices, and (where elected) guardian on-person carry rules; SB 51 adds the SIS threat-assessment flag. Quest participates in the school-guardian program. School Safety and Security Director designated as Mike McNeely (per § 53G-8-701.8).
Threat Assessment	SB 51 requires a multidisciplinary threat-assessment team, intake/triage process, classification (Low/Medium/High), management plan, and SIS flagging procedure. Team includes the School Safety and Security Director.
TSSA Calculation and Distribution	Quest qualifies for and receives TSSA funds. SB 241 requires schools below the statewide third-grade reading goal to allocate ≥50% of TSSA funds to evidence-based literacy initiatives.
Elementary and Secondary School General Core	HB 312 requires separate U.S. History and Constitutional Government semester courses in grades 9-12; SB 268 requires coordination with religious-expression protections.

Items Not Adopted or Deferred

Based on Quest's specific circumstances, the following items from the original package are not being brought forward at the 5/21/2026 meeting:

Item	Disposition
Citizenship Grading and Test-Out	Deferred. Quest will revisit before SY 2027-2028 implementation per HB 502.
American Indian / Alaska Native Education Plan	Not adopted. Quest does not serve qualifying students under HB 75; state board is developing a model plan.
Pupil Accounting — Learner Validated Enrollment	Not adopted. Quest is attendance-validated; not applicable.
School Construction / Capital Project	Deferred. Hold until construction start dates are known.
Extracurricular / Co-curricular Participation	Not adopted. Quest does not participate per Utah Code § 53G-6-703.
AI Sandbox CTE Courses (within AI Use Policy)	Deferred. Wait for USBE model policy (expected before 12/1/2026; HB 273 adoption deadline 7/1/2027).
HB 393 Dyslexia Pilot	Not adopted. Quest does not participate in the optional pilot.
K-3 Early Literacy / Reading Plans	Removed from this draft per administrative direction. Flag: SB 241 imposes a literacy obligation for LEAs with K-3 students; recommend revisiting at a future board meeting to confirm compliance pathway.

End of Summary.

QUEST ACADEMY

New Stand-Alone Policies

2026 Utah General Session — Required State Policies

Prepared: May 15, 2026

Scope: 12 new stand-alone policies for adoption at the 5/26/2026 board meeting

(Companion document: QA_Modified_Policies.docx)

How to Read This Document

This document contains full-text drafts of 12 new policies required by the 2026 Utah General Session for Quest Academy. Each policy is presented as a stand-alone, ready-to-adopt draft incorporating decisions made by Quest's Director and the Board Chair.

Conventions

- Each policy opens with a banner identifying status, the driving bill, and the effective date.
- Quest-specific values (designated officers, named programs) have been filled in from administrative decisions.
- Amber-bordered notes flag any items still requiring confirmation or future action.

Items Deferred or Not Adopted

The following items from the original 18-policy package have been removed from this draft based on Quest's specific circumstances:

- Citizenship Grading and Test-Out — implementation deferred until SY 2027-2028 per HB 502.
- American Indian / Alaska Native Education Plan — Quest does not serve qualifying students; state board will develop a model plan.
- Pupil Accounting — Learner Validated Enrollment — N/A; Quest operates an attendance-validated program.
- School Construction / Capital Project — held pending future construction start dates.
- Extracurricular / Co-curricular Participation — N/A; Quest does not participate per § 53G-6-703.
- AI Sandbox CTE provisions — deferred until USBE releases the model policy (expected before 12/1/2026; HB 273 adoption deadline 7/1/2027).
- HB 393 Dyslexia Pilot participation — Quest does not participate in the optional pilot.

Summary of New Policies

Listed in order of effective date.

#	New Policy Title	Driver	Effective
1	Board Member Oath of Office Policy	SB 186 (2026)	5/6/2026
2	Cybersecurity Policy	HB 44; SB 123 (2026)	5/6/2026
3	Artificial Intelligence (AI) Use Policy	HB 273 (2026)	7/1/2026
4	Cardiac Emergency Response Plan Policy	SB 244 (2026)	7/1/2026
5	Dyslexia Screening and Intervention Policy	SB 81 (2026)	7/1/2026
6	Noncurricular Clubs / Equal Access Policy	SB 295 (2026)	7/1/2026
7	Parental, Postpartum, Adoption, and Foster Leave Policy	HB 329 (2026)	7/1/2026
8	Restraint and Least Restrictive Behavior Interventions (LRBI) Policy	SB 181 (2026)	7/1/2026
9	School Security (School Security Act) Policy	HB 44; SB 51 (2026)	7/1/2026
10	Threat Assessment Policy	SB 51 (2026)	7/1/2026
11	TSSA Calculation and Distribution Policy	SB 241 (2026)	7/1/2026
12	Elementary and Secondary School General Core Policy	HB 312; SB 268 (2026)	7/4/2026

1. Board Member Oath of Office Policy

NEW POLICY	 	Status: Required	 	Driver: SB 186 (2026); 53G-5-203; 52-1-1	 	Effective: 5/6/2026
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Purpose

This policy establishes the requirement that members of the Quest Academy Board of Directors take an oath of office before assuming the duties of board membership, consistent with Utah Code § 53G-5-203 and § 52-1-1, as clarified for charter local education agencies ("LEAs") by SB 186 (2026).

Policy

Each individual elected or appointed to the Quest Academy Board of Directors shall take and subscribe to an oath of office before assuming the duties of the office.

Oath Language

The oath shall read substantially as follows:

"I do solemnly swear (or affirm) that I will support, obey, and defend the Constitution of the United States and the Constitution of the State of Utah, and that I will discharge the duties of my office with fidelity. I will faithfully serve the students, families, employees, and patrons of Quest Academy and will uphold the mission and policies of the School to the best of my ability."

Administration of the Oath

- The Oath shall be administered by the Board Chair, or in the Chair's absence, the Vice Chair.
- The Oath shall be administered before the new Board member's first official act as a Board member, including before voting at any board meeting.
- The Oath shall be administered in person whenever practicable; if administered remotely, the administering officer shall verify the identity of the new Board member through government-issued photo identification.

Recordkeeping

- A signed copy of each Oath of Office shall be filed with the Board Secretary and retained as a permanent public record of the School.
- Signed Oaths shall be classified as PUBLIC records under GRAMA and shall be available for inspection upon request consistent with the School's GRAMA Policy.
- The Board Secretary shall maintain a current list of all Board members and the date each Oath was administered.

Failure to Take the Oath

A Board member who has not taken the Oath of Office may not vote, exercise any other Board authority, or act in an official capacity. Any vote cast or action taken by an individual who has not taken the Oath shall be voidable upon discovery.

Annual Review

The Board shall review this policy annually.

2. Cybersecurity Policy

NEW POLICY | **Status:** Required | **Driver:** HB 44 (2026); SB 123 (2026); R277-487; 53G-8-802 | **Effective:** 5/6/2026

Purpose

To establish minimum cybersecurity standards for Quest Academy that protect student, employee, and operational data, consistent with HB 44 (2026), SB 123 (2026), R277-487, and Utah Code § 53G-8-802. This policy is distinct from the School's Internet Safety (CIPA) Policy and the Student Data Privacy & Security Policy.

Cybersecurity Officer

The Board hereby designates the IT Specialist Role as the School's Cybersecurity Officer ("CSO"). The CSO is responsible for:

- Implementing and maintaining minimum cybersecurity standards adopted by USBE;
- Conducting an annual cybersecurity risk assessment using a recognized framework (e.g., NIST CSF, CIS Controls);
- Coordinating with USBE on incident reporting and statewide cybersecurity initiatives;
- Overseeing the cybersecurity training program for all employees and contractors;
- Approving cybersecurity-relevant procurements and vendor security reviews.

Minimum Cybersecurity Standards

The School shall implement, at minimum:

- Multi-factor authentication on all administrative, staff email, and student-information-system accounts;
- Endpoint protection (anti-malware) on all School-owned devices with automatic updates;
- Network segmentation separating student-network, staff-network, and administrative systems;
- Encrypted storage and transmission of personally identifiable information;
- Daily incremental and weekly full backups of mission-critical systems with offline or immutable backup copies;
- Patch-management procedures with critical patches applied within 14 days of release;
- Annual penetration testing or vulnerability assessment;
- Centralized logging with a minimum 12-month retention.

Vendor Security Review

Before contracting with any vendor that will have access to School systems or PII, the CSO (or designee) shall conduct a security review including:

- Verification of the vendor's compliance with applicable Utah Student Data Privacy law and FERPA;
- Review of the vendor's most recent SOC 2 report or equivalent security attestation;
- Confirmation that the vendor contract includes the data-protection and termination clauses required by the Student Data Privacy & Security Policy.

Incident Response

Cybersecurity incidents shall be handled in accordance with the School's Incident Response Plan, which the CSO shall maintain and review annually. The Plan shall address:

- Detection and triage;
- Containment and eradication;
- Recovery and post-incident review;
- Stakeholder communications including legal counsel, insurance carrier, and the Board.

Breach Notification

A cybersecurity incident that involves unauthorized access to or acquisition of personally identifiable information shall be classified as a data breach. Confirmed data breaches shall be reported:

- Within 24 hours of confirmation, to the Utah State Board of Education, in accordance with HB 44 (2026);
- To affected individuals (parents/employees) within the timelines required by R277-487 and Utah Code § 13-44-202;
- To law enforcement when criminal activity is suspected;
- To the Quest Academy Board no later than the next regularly scheduled board meeting.

Training

All employees, contractors, and Board members shall complete cybersecurity awareness training upon hire/appointment and annually thereafter. The CSO shall maintain training-completion records.

Annual Review

The CSO shall present an annual cybersecurity report to the Board that includes risk-assessment findings, training completion rates, incident summary, and recommendations for the upcoming year. The Board shall review this Policy annually.

3. Artificial Intelligence (AI) Use Policy

NEW POLICY | **Status:** Required | **Driver:** HB 273 (2026); 53G-9-205 | **Effective:** 7/1/2026 (USBE model adoption deadline 7/1/2027)

Purpose

To establish principles, expectations, and guardrails for the use of artificial intelligence ("AI") tools by Quest Academy students, employees, and contractors, consistent with HB 273 (2026) and Utah Code § 53G-9-205. This policy is distinct from, and complements, the School's Acceptable Use / Electronic Device Use Policy.

Definitions

- "Artificial intelligence" or "AI" means a system that uses machine learning, large language models, generative algorithms, or similar technologies to produce text, images, audio, video, code, or recommendations.
- "AI tool" means any application, service, or platform that uses AI.
- "School-approved AI tool" means an AI tool that has been reviewed and approved by the Director (or AI Review Committee) for use in School-sponsored activities.

Guiding Principles

- AI tools may augment learning and productivity but shall not replace the development of foundational student skills (literacy, numeracy, critical thinking, writing).
- AI use must protect student data privacy, comply with FERPA and Utah Student Data Protection Act, and align with the Student Data Privacy & Security Policy.
- AI use must preserve academic integrity; student-submitted work must reflect the student's own learning.
- AI tools must be evaluated for bias, accuracy, and age-appropriateness before classroom use.

Approval Process for AI Tools

Before an AI tool is used in instruction or with student data, the Director (or designee) shall verify:

- The vendor's privacy policy is reviewed and approved under the Student Data Privacy & Security Policy;
- A signed data-protection addendum is on file where the tool processes student PII;
- The tool's age-appropriateness has been assessed;
- Parents have been notified of the tool's use as required.

A list of School-approved AI tools shall be published on the School's website and updated at least annually.

Student Use

- Students may use School-approved AI tools as directed by the teacher and consistent with the assignment instructions.
- Students shall disclose AI assistance when the teacher requests disclosure or when the assignment requires original student work.
- Students shall not enter into AI tools any personally identifiable information about themselves, classmates, or staff except as expressly permitted by the teacher.
- Use of AI to generate or distribute deceptive media (e.g., deepfakes targeting a person) is prohibited and will be addressed under the Student Conduct and Discipline Policy and Bullying & Hazing Policy.

Employee Use

- Employees may use School-approved AI tools to support lesson planning, drafting communications, or routine administrative tasks.
- Employees shall not enter student PII, employee PII, or confidential School information into a non-approved AI tool.

- AI-generated content used in formal School communications shall be reviewed and edited by the employee for accuracy.
- Employees shall not rely solely on AI output for high-stakes decisions about students (grading, discipline, special-education referrals); a qualified human shall make such decisions.

AI-Literacy Instruction

The School shall integrate developmentally appropriate AI-literacy instruction into the curriculum, addressing how AI works, its limitations and biases, ethical use, and verification of AI outputs.

Adoption of USBE Model Policy

► **USBE Model Policy Pending:** USBE is expected to release a model AI Use Policy before 12/1/2026. By July 1, 2027, the Board shall adopt the USBE model AI Use Policy, or after public discussion, an amended version of the USBE model. Monitor USBE communications and substitute the model language where it improves on this draft. AI Sandbox provisions for CTE courses are deferred pending the USBE model.

Annual Review

The Board shall review this Policy annually.

4. Cardiac Emergency Response Plan Policy

NEW POLICY	Status: Required	Driver: SB 244 (2026)	Effective: 7/1/2026
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Purpose

To establish a Cardiac Emergency Response Plan ("CERP") for Quest Academy that prepares the School to respond to a sudden cardiac arrest, consistent with SB 244 (2026).

Cardiac Emergency Response Team

The Director shall designate a Cardiac Emergency Response Team ("CERT") consisting of:

- The School Nurse (Team Leader);
- The Director or designee;
- At least three (3) other trained employees representing different parts of the School building (e.g., front office, P.E. department, after-school program lead);
- The Athletic Director (if any) for athletic-event response.

Each CERT member shall maintain current CPR/AED certification.

AED Placement and Inspection

- The School shall maintain at least one (1) Automated External Defibrillator ("AED") at the School site, with additional units placed so that any location in the building (including gymnasiums and outdoor athletic areas) is reachable within three (3) minutes.
- Each AED shall be mounted in a clearly marked, unlocked location accessible during all hours that students or staff are on site.
- AEDs shall be inspected monthly by a designated CERT member. The inspection shall confirm: (a) battery status; (b) pad expiration date; (c) device readiness indicator; (d) presence of accessory kit (gloves, scissors, razor).
- Inspection records shall be maintained by the School Nurse for not less than three (3) years.

CPR/AED Training

- All certified employees shall be encouraged to complete CPR/AED training; the School shall make training available at School expense at least annually.
- All CERT members shall hold current certification.
- All P.E. teachers, coaches, and after-school program supervisors shall hold current certification.

Drills

- The School shall conduct at least one (1) cardiac response drill per school year.
- The drill shall test 9-1-1 communication, AED retrieval and deployment, CPR initiation, and coordination with EMS upon arrival.
- A debrief shall occur after each drill and the debrief notes shall be retained by the School Nurse.

Response Procedure

When a sudden cardiac arrest is suspected:

1. Recognize unresponsiveness and absent or abnormal breathing.
2. Call (or instruct another adult to call) 9-1-1 immediately and notify the front office.
3. Initiate CPR (chest compressions).
4. Send a runner to retrieve the nearest AED and apply per device prompts.
5. Continue CPR/AED cycles until EMS arrives.
6. Clear the area; designate one staff member to brief EMS on arrival.

Post-Incident Review

Within five (5) school days of any cardiac event (drill or actual), the CERT shall conduct a post-incident review and document findings, including any equipment, training, or procedural improvements identified. Findings shall be reported to the Director and, if material, to the Board.

Plan Adoption and Annual Review

The Board shall adopt this CERP and review it annually. The School Nurse shall provide an annual report to the Board including AED inspection summary, training completion rates, drill outcomes, and any actual events.

► **USBE Template Pending:** USBE is expected to release a CERP template. Substitute USBE template language where it improves on this draft before final adoption.

5. Dyslexia Screening and Intervention Policy

NEW POLICY	Status: Required	Driver: SB 81 (2026); 53E-3-521	Effective: 7/1/2026
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Purpose

To establish universal dyslexia screening and tiered intervention practices that support all Quest Academy students at risk of or identified with characteristics of dyslexia, consistent with SB 81 (2026) and Utah Code § 53E-3-521.

Universal Screening

- The School shall administer an evidence-based dyslexia screening tool to all students in kindergarten and grades 1-3 at least once per school year.
- Screening tools shall align with the requirements published by USBE and shall include phonological awareness, rapid automatized naming, letter-sound knowledge, and word-reading components as developmentally appropriate.
- Screening data shall be reviewed by the School's Reading Team within 15 school days of administration.

Tiered Intervention

Students identified as at risk through screening shall receive intervention according to a multi-tiered system of supports:

- Tier 1: High-quality core reading instruction with structured literacy components for all students.
- Tier 2: Targeted small-group intervention (3-5 days/week, 20-30 minutes) using a structured literacy program for students who do not meet benchmark.
- Tier 3: Intensive individualized intervention (daily, 30-45 minutes) using a structured literacy program with progress monitoring at least every two weeks.

Parent Notification

Parents shall be notified in writing within ten (10) school days of:

- Initial screening results, including whether the student met benchmark;
- Recommended intervention tier;
- Progress-monitoring results at least quarterly;
- Recommendation for special-education evaluation if Tier 3 intervention does not produce adequate progress.

Coordination with Special Education

Students who do not show adequate progress through Tier 3 intervention shall be referred for evaluation under the IDEA in coordination with the Special Education Policies & Procedures Manual. Dyslexia-related intervention services described in the IEP shall be implemented in addition to (not in place of) general-education tiered intervention.

Staff Training

All K-3 teachers and reading interventionists shall receive professional development on the science of reading, structured literacy, and dyslexia identification before assuming primary reading-instruction responsibilities.

Annual Review

The Director shall report annually to the Board on screening outcomes, intervention effectiveness, and staff training completion. The Board shall review this Policy annually.

6. Noncurricular Clubs / Equal Access Policy

NEW POLICY	Status: Required	Driver: SB 295 (2026); 53G-7-701 et seq.; 20 U.S.C. § 4071 (Equal Access Act)
	Effective: 7/1/2026	

Purpose

To establish Quest Academy's framework for permitting student-initiated noncurricular clubs on a viewpoint-neutral basis consistent with the federal Equal Access Act, the Utah Intellectual Diversity in Education Act (SB 295 (2026)), and Utah Code § 53G-7-701 et seq.

Definitions

- "Curricular club" means a student club whose subject matter is directly related to the body of courses offered by the School, that concerns the body of courses as a whole, that participates in concert with the courses, or that uses participation as a basis for granting academic credit.
- "Noncurricular club" means a student club that is not a curricular club, including special-interest groups, religious or political clubs, and similar voluntary student organizations.

Equal Access

Where Quest Academy permits one or more noncurricular clubs to meet on School premises during non-instructional time, the School shall not deny equal access or a fair opportunity to other students wishing to form a noncurricular club on the basis of the religious, political, philosophical, or other content of the speech at the proposed meetings.

Application Process

A student or group of students wishing to form a noncurricular club shall submit an application to the Director that identifies:

- The proposed club name and purpose;
- Anticipated meeting times, frequency, and location;
- The student officer(s) responsible for the club;
- The faculty sponsor (see below).

The Director shall approve or deny the application within fifteen (15) school days based on the criteria in this Policy and shall provide written reasons for any denial. Denials may be appealed in writing to the Board.

Faculty Sponsorship

- Each noncurricular club shall have a faculty sponsor present at all meetings on School premises.
- The faculty sponsor's role is custodial: ensuring safety, compliance with School rules, and orderly use of facilities. The sponsor shall not participate substantively in the club's content.
- Faculty sponsorship is voluntary; no employee shall be required to sponsor a club.

Viewpoint Neutrality

The School shall not regulate the content of speech or discussion within an approved noncurricular club beyond reasonable restrictions necessary for safety, order, and protection of student rights. The School shall not require a club to alter its name, mission, or activities on the basis of religious, political, or philosophical viewpoint.

Facilities and Resources

- All approved noncurricular clubs shall have equal access to School facilities subject to availability and the Building Use Policy.
- Where the School provides any resources (e.g., publication space, announcement time, fundraising opportunities) to one noncurricular club, comparable access shall be available to all approved noncurricular clubs.

Limitations

The School may deny an application or restrict an approved club where:

- The activity would materially disrupt the orderly conduct of educational activities;
- The activity would violate federal, state, or local law;
- Non-school persons would direct, conduct, control, or regularly attend the activities.

Annual Review

The Board shall review this Policy annually.

7. Parental, Postpartum, Adoption, and Foster Leave Policy

NEW POLICY	Status: Required	Driver: HB 329 (2026); Utah Code § 67-19-14.4	Effective: 7/1/2026
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Purpose

To provide eligible Quest Academy employees with paid leave following the birth, adoption, or foster placement of a child, consistent with HB 329 (2026) and Utah Code § 67-19-14.4. This Policy is distinct from, and may run concurrently with, federal Family and Medical Leave Act (FMLA) entitlements.

Eligibility

An employee is eligible for leave under this Policy if the employee:

- Has been continuously employed by Quest Academy for at least twelve (12) months;
- Is regularly scheduled to work at least 20 hours per week;
- Is the biological mother, biological father, adoptive parent, or foster parent of a qualifying child.

Qualifying Events

- Birth of the employee's child;
- Postpartum recovery for the birth mother;
- Placement of a child with the employee for adoption;
- Placement of a child with the employee through licensed foster care.

Leave Amount

Eligible employees shall receive paid leave in accordance with Utah Code § 67-19-14.4 and applicable State Personnel Management rules. The amount and structure of leave shall track the State's adopted policy for governmental employees as amended from time to time. The leave may be taken continuously or, with Director approval, intermittently within twelve (12) months of the qualifying event.

Use of Other Leave Banks

- Leave under this Policy is provided in addition to accrued sick, personal, or annual leave.
- After exhausting leave under this Policy, an eligible employee may use accrued leave or unpaid FMLA leave to extend the absence.

Request Procedure

To request leave, the employee shall:

- Provide at least thirty (30) days' written notice to the Director where foreseeable;
- Submit supporting documentation (e.g., birth certificate, adoption decree, foster placement letter) within thirty (30) days of leave commencement;
- Coordinate with the Director on coverage of duties and a return-to-work date.

Benefits Continuation

During approved leave under this Policy, the School shall maintain group health insurance coverage on the same terms as if the employee were actively at work. The employee remains responsible for the employee portion of premiums.

Return to Work

An employee returning from leave under this Policy shall be restored to the same position, or an equivalent position with equivalent pay, benefits, and other terms and conditions, consistent with FMLA principles.

Coordination with Lactation Accommodation

Birth mothers returning from leave under this Policy shall have access to lactation accommodation as provided in the School's Employee Breastfeeding policy.

Annual Review

The Board shall review this Policy annually.

8. Restraint and Least Restrictive Behavior Interventions (LRBI) Policy

NEW POLICY	Status: Required	Driver: SB 181 (2026); R277-609; 53G-8-302	Effective: 7/1/2026
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Purpose

To establish standards governing the use of physical restraint and other emergency safety interventions at Quest Academy, ensuring that the least restrictive intervention is used and that students are protected from unnecessary or harmful interventions, consistent with SB 181 (2026), R277-609, and Utah Code § 53G-8-302.

Definitions

- "Physical restraint" means a personal restriction that immobilizes or reduces the ability of a student to move the student's torso, arms, legs, or head freely.
- "Mechanical restraint" means the use of any device or equipment to restrict a student's freedom of movement. Mechanical restraint is PROHIBITED.
- "Chemical restraint" means a drug or medication used to control behavior or restrict freedom of movement that is not standard treatment for the student's medical or psychiatric condition. Chemical restraint is PROHIBITED.
- "Prone restraint" (face-down) is PROHIBITED.

Quest Academy Does Not Use Seclusion

Quest Academy does not maintain a seclusion room and does not use seclusion as an emergency safety intervention. The involuntary confinement of a student alone in a room or area from which the student is physically prevented from leaving is not authorized at Quest Academy. To the extent SB 181 (2026) authorizes seclusion, Quest Academy elects not to exercise that authority.

Permitted Use of Physical Restraint

Physical restraint shall be used only as an emergency safety intervention when:

- A student's behavior poses an imminent risk of serious physical harm to the student or others;
- Less restrictive interventions have been or would be ineffective; and
- The intervention is implemented by personnel trained in approved restraint techniques.

Physical restraint shall not be used: as discipline, as punishment, for staff convenience, to coerce compliance with academic tasks, or as a substitute for appropriate educational programming.

Documentation and Notification

- Every use of physical restraint shall be documented within one (1) school day on a standardized incident report including: student, date/time, antecedent, intervention used, duration, personnel involved, debrief, and follow-up plan.
- The student's parent shall be notified the same day the restraint occurs (verbally) and within two (2) school days in writing.
- Multiple incidents (3 or more in a 12-month period) shall trigger a functional behavior assessment and behavior intervention plan review.

Training

Personnel who may need to implement physical restraint shall complete an evidence-based training program (e.g., CPI, Mandt, Ukeru) before implementing such interventions. Refresher training shall occur at least every two (2) years.

Reporting to USBE

The School shall report annual aggregate restraint data to USBE in accordance with R277-609 and shall complete the SB 181 reporting required by December 31, 2026. The report shall indicate that Quest Academy does not use seclusion.

Annual Review

The Director shall present an annual report to the Board summarizing restraint incidents, training completion, parent feedback, and recommendations for improvement. The Board shall review this Policy annually.

9. School Security (School Security Act) Policy

NEW POLICY	Status: Required	Driver: HB 44 (2026); SB 51 (2026); Utah Code § 53-22-101 to 103; § 53G-8-701.8
	Effective: 7/1/2026	

Purpose

To establish Quest Academy's school security framework consistent with the Utah School Security Act (Utah Code § 53-22-101 to 103), HB 44 (2026), SB 51 (2026), and Utah Code § 53G-8-701.8. This Policy coordinates with the Threat Assessment Policy, the Cybersecurity Policy, and the Health and Welfare Policy.

School Safety and Security Director

In accordance with Utah Code § 53G-8-701.8, the Board hereby designates the School Safety and Security Director as the School's designated security officer. The School Safety and Security Director is responsible for:

- Coordinating implementation of this Policy and the Threat Assessment Policy;
- Maintaining the School Safety and Emergency Plan;
- Coordinating with local law enforcement and the Utah State Board of Education;
- Reporting annually to the Board.

Visitor Management

- All visitors shall enter through a single designated entrance during school hours.
- Visitors shall sign in, present photo identification, and receive a visitor badge to be displayed visibly while on the premises.
- Visitor identification shall be checked against the National Sex Offender Public Website (and any other registries required by USBE) before issuing a badge.
- Unaccompanied visitors are prohibited; an employee shall escort any visitor whose business requires access beyond the front office.

Wearable Panic Devices

The School shall equip designated personnel (Director, front office staff, school nurse, and others designated by the School Safety and Security Director) with wearable panic devices that, when activated, alert all building staff and (where configured) local law enforcement. Devices shall be tested at least quarterly.

Guardian Program

Quest Academy participates in the school-guardian program authorized by HB 44 (2026). Accordingly:

- Guardians shall be designated by name and approved by the Board after a documented background check, training, and qualification process consistent with HB 44;
- Guardians shall carry concealed in accordance with HB 44 on-person carry rules; off-person storage in lockers or vehicles is not permitted while on duty;
- Guardians shall complete initial and annual recertification training as required by HB 44;
- A list of designated guardians shall be classified as PROTECTED under GRAMA and shall be maintained by the School Safety and Security Director and shared with local law enforcement.

Emergency Drills

- The School shall conduct emergency drills consistent with R277-400, including fire drills, lockdown drills, and reverse-evacuation drills, at the frequency required by rule.
- Drill outcomes shall be documented and reviewed by the School Safety and Security Director.

SIS Threat-Assessment Flag (per SB 51)

The School's student information system shall include the threat-assessment flag required by SB 51 (2026). The flag shall be entered, viewed, and updated only by personnel authorized under the Threat Assessment Policy and shall transfer with the student's record consistent with FERPA and Utah Code § 53G-8-205.

Cybersecurity Coordination

Physical security and cybersecurity are coordinated through the School Safety and Security Director and the Cybersecurity Officer. Joint annual tabletop exercises shall test the School's response to combined physical/cyber events.

Annual Review

The School Safety and Security Director shall present an annual School Security Report to the Board, including drill outcomes, visitor-management metrics, threat-assessment activity (de-identified), guardian-program updates, and recommendations. The Board shall review this Policy annually.

10. Threat Assessment Policy

NEW POLICY	Status: Required	Driver: SB 51 (2026); Utah Code § 53G-8-802; § 53-22-101 et seq.; § 53G-8-701.8
	Effective: 7/1/2026	

Purpose

To establish Quest Academy's process for identifying, assessing, and responding to threats of targeted violence by or against students, employees, or the School community, consistent with SB 51 (2026), Utah Code § 53G-8-802, the Utah School Security Act, and Utah Code § 53G-8-701.8.

Threat Assessment Team

The Director shall convene a Threat Assessment Team ("TAT") consisting of:

- The Director (Team Leader);
- The School Counselor or Mental Health Coordinator;
- The School Safety and Security Director (per Utah Code § 53G-8-701.8);
- A general-education teacher and a special-education teacher (consultative as needed);
- The School Resource Officer (SRO) or local law-enforcement liaison (consultative as needed).

All TAT members shall complete training in evidence-based threat assessment (e.g., Comprehensive School Threat Assessment Guidelines or equivalent).

Reporting a Threat

Any student, employee, parent, or community member may report a perceived threat to the Director, any TAT member, or via the SafeUT app. Anonymous reports shall be accepted and acted upon.

Triage and Initial Assessment

Upon receipt of a report, the TAT shall, within 24 hours (or sooner where imminent harm is suspected):

- Determine whether the situation involves imminent danger requiring immediate law-enforcement intervention;
- Conduct an initial inquiry: interview the reporter, the subject (where appropriate and legally permissible), and others with information;
- Review the subject's school records, prior threat-assessment history, and any social media or communications brought to the team's attention;
- Classify the threat as Low, Medium, or High.

Threat Classification

- **LOW:** Vague, indirect, or implausible. The team documents the assessment and may recommend brief intervention.
- **MEDIUM:** Some specificity but lacks plan, target, or means. The team develops a management plan including counseling, parent meeting, and monitoring.
- **HIGH:** Specific, plausible, with identifiable target, means, and indications of intent or planning. The team coordinates with law enforcement and convenes a multidisciplinary response.

Management Plan

For Medium and High threats, the TAT shall develop a written management plan addressing:

- Mental-health support (referral, counseling, crisis services);
- Academic accommodations or schedule changes;
- Parent involvement and communication;
- Coordination with law enforcement, juvenile probation, or other agencies;
- Restorative or disciplinary actions consistent with the Student Conduct Policy;

- Re-assessment timeline.

SIS Flag (per SB 51)

Where a threat assessment results in identified risk requiring monitoring, the TAT shall enter a threat-assessment flag in the student information system in accordance with SB 51 (2026). The flag shall include the assessment date, classification, and management-plan summary. Access to the flag shall be limited to TAT members, the Director, and personnel with a documented need to know. The flag shall transfer with the student's record consistent with FERPA and Utah Code § 53G-8-205.

Documentation

All threat-assessment activities shall be documented in a confidential file maintained by the Director. Files shall be classified as PROTECTED under GRAMA and retained according to the School's Records Retention Schedule.

Family / Law-Enforcement Coordination

- Parents shall be notified when their student is the subject of a threat assessment, except where notification would compromise safety or violate court protections.
- Where a credible threat exists, the TAT shall coordinate with local law enforcement and, where applicable, with the juvenile court or DJJYS.

Annual Review

The Director shall provide an annual de-identified report to the Board summarizing threat-assessment activity, training completion, and program effectiveness. The Board shall review this Policy annually.

11. TSSA Calculation and Distribution Policy

NEW POLICY	Status: Required	Driver: SB 241 (2026); R277-913	Effective: 7/1/2026
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Purpose

To establish Quest Academy's process for calculating, distributing, and reporting expenditures of Teacher and Student Success Act ("TSSA") funds, consistent with R277-913 and SB 241 (2026). Quest Academy qualifies for and receives TSSA funds.

Annual Allocation Plan

- Each fiscal year, the Director shall develop a TSSA allocation plan based on the prior-year USBE allocation notice.
- The plan shall be reviewed by the School Community Council, and presented to the Board for approval before the start of the fiscal year or within 30 days of the USBE allocation notice, whichever is later.

Permitted Uses

TSSA funds may be used only for purposes authorized in R277-913, including:

- Class-size reduction;
- Teacher compensation and professional learning;
- Targeted academic interventions for students at risk of academic failure;
- Evidence-based literacy initiatives;
- Other uses authorized by USBE.

Literacy Set-Aside (SB 241)

If the most recent USBE third-grade reading benchmark data indicates that Quest Academy is below the statewide reading-proficiency goal, the School shall allocate not less than fifty percent (50%) of its TSSA funds for the upcoming fiscal year to evidence-based literacy initiatives.

Reporting

- The Director shall report TSSA expenditures and outcomes to the Board annually.
- The Director shall complete the USBE TSSA reporting required by R277-913 by the published deadlines.

Annual Review

The Board shall review this Policy annually.

12. Elementary and Secondary School General Core Policy

NEW POLICY		Status: Required		Driver: HB 312 (2026); SB 268 (2026); R277-700		Effective: 7/4/2026
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Purpose

To establish Quest Academy's compliance with the Elementary and Secondary School Core requirements set out in R277-700, including the social studies and civics requirements added by HB 312 (2026) and the religious-expression coordination required by SB 268 (2026).

Core Curriculum Adoption

Quest Academy adopts the Utah Core Standards as the basis for instruction in all subject areas. Curriculum and instructional materials shall be selected consistent with the Selection, Approval, and Purchase of Instructional Materials Policy.

Social Studies Requirements (per HB 312)

- Quest Academy shall provide social studies instruction at every grade level in accordance with the Utah Core Standards.
- In grades 9-12, the School shall offer United States History as a separate semester-long course.
- In grades 9-12, the School shall offer United States Government and Citizenship (constitutional government) as a separate semester-long course.
- These courses shall not be combined with each other or with other social studies content into a single semester.

► **Quest Grade Levels:** Quest Academy currently serves K-9. Confirm whether the school plans to expand to grades 10-12; the 9-12 social studies requirements apply if/when those grades are offered. If Quest remains K-9, the policy still adopts the K-12 framework but the secondary-specific provisions are forward-looking.

Civic Engagement

In addition to U.S. History and Government, the School shall provide opportunities for students to engage in civic learning through service-learning, simulations, mock elections, or other developmentally appropriate experiences.

Coordination with Religious Expression

Curriculum and instructional materials shall be implemented consistent with the Religious Expression in Public Schools Policy, including viewpoint neutrality and accommodation of student religious expression.

Reporting

The Director shall verify annually that the master schedule reflects compliance with the social studies and civics requirements (where applicable to the grade levels Quest offers).

Annual Review

The Board shall review this Policy annually.

Closing Notes

Summary

This document contains drafts of all 12 new stand-alone policies recommended for adoption at the May 26, 2026 board meeting.

Items Deferred (will return to Board at a later date)

- AI Sandbox CTE provisions — pending USBE model policy release (expected before 12/1/2026; HB 273 adoption deadline 7/1/2027).
- Citizenship Grading and Test-Out — Quest will revisit before SY 2027-2028.
- School Construction / Capital Project — when construction start dates are known.

Items Not Adopted

- American Indian / Alaska Native Education Plan — Quest does not serve qualifying students; state board to develop model plan.
- Pupil Accounting — Learner Validated Enrollment — N/A; Quest is attendance-validated.
- Extracurricular / Co-curricular Participation — N/A; Quest does not participate per § 53G-6-703.
- HB 393 dyslexia pilot — Quest does not participate.

Cross-References to Existing Manual

These new policies coordinate with redlined modifications to existing policies (companion document: QA_Modified_Policies.docx).

End of Document.

QUEST ACADEMY

Modified Policies

2026 Utah General Session — Required State Policies

Prepared: May 8, 2026

Scope: Modifications to existing policies (15 sections covering 14 policies)

(New stand-alone policies will be addressed separately)

How to Read This Document

This document contains redline modifications to Quest Academy's existing policies, driven by 2026 Utah legislative changes. Each redlined section shows the proposed insertions and deletions against the current manual content.

Redline Conventions

Insertions are shown like this: inserted text in green underlined.

Deletions are shown like this: ~~deleted text in red strikethrough~~.

Editor Notes appear in amber boxes alongside redlines and explain the legislative driver and rationale.

Adoption Process

- Review each redline; accept or reject changes.
- Replace bracketed placeholders [LIKE THIS] with Quest-specific values.
- Schedule board adoption according to effective-date sequencing in the summary table below.
- Update the master Policies & Procedures Manual table of contents to reflect renamed policies.
- New stand-alone policies (e.g., AI Use, Cardiac Emergency Response Plan, Threat Assessment, School Security, Restraint, TSSA, Cybersecurity, Religious Expression coordination, Parental Leave, Noncurricular Clubs, Citizenship Grading, Board Member Oath, Extracurricular Participation, Elementary/Secondary General Core, AI/AN Plan, Pupil Accounting Learner-Validated, School Construction) are NOT included in this document and will be drafted separately.

Summary of Modifications

The following table lists each existing policy in the Quest Academy Policies & Procedures Manual that requires modification, with the legislative driver and effective date.

#	Existing Policy (Manual Title)	Renamed To (if applicable)	Driver	Effective
1	Truancy Intervention Policy + Attendance Policy	Absenteeism and Truancy Prevention Policy	SB 58; HB 145	7/1/2026
2	Electronic Resources Policy	Acceptable Use / Electronic Device Use Policy	SB 69; HB 44; SB 88; HB 273	7/1/2026
3	Background Check Policy + Arrest Reporting Policy	Criminal Background Check / Arrest Reporting Policy	SB 312	5/6/2026
4	LEA-Specific Educator License Policy	(no rename)	SB 312	5/6/2026
5	Information Technology Security Policy + IT Systems Security Plan	Internet Safety Policy (CIPA) — modify; Cybersecurity is separate	HB 44	5/6/2026
6	Meal Charge Policy	(no rename)	HB 148	5/6/2026
7	Enrollment & Lottery Policy	Open Enrollment / Lottery Policy	SB 131	7/1/2026
8	Religion & Education Policy	Religious Expression in Public Schools Policy	SB 268	7/4/2026
9	Fee Waiver Policy	School Fees Policy	HB 142	7/1/2026
10	Student Conduct & Discipline Policy	(no rename)	HB 299; SB 167; SB 181; HB 188	7/1/2026
11	Student Data Privacy & Security Policy + Data Governance Plan	(no rename)	SB 296; SB 152; HB 55	7/1/2026
12	Health Examination Policy + Wellness Policy	Health and Welfare Policy	SB 244; HB 351	7/1/2026
13	Credit Evaluation Policy	Student Credit Policy	HB 358	7/1/2026
14	Government Records Access Management Act (GRAMA) Policy	(no rename)	HB 147	7/1/2027
15	Special Education Policies & Procedures Manual (separate document)	(no rename — see note)	HB 143; HB 448; SB 81	7/1/2026

Recommended Adoption Sequence

- May 2026 board meeting — adopt items effective 5/6/2026: #3 (Background Check), #4 (Educator License), #5 (Internet Safety/IT Security), #6 (Meal Charge).
- June 2026 board meeting — adopt items effective 7/1/2026 and 7/4/2026: #1 (Absenteeism), #2 (Acceptable Use), #7 (Open Enrollment), #8 (Religious Expression), #9 (School Fees), #10 (Student Conduct), #11 (Data Privacy), #12 (Health & Welfare), #13 (Student Credit), #15 (SPED Manual coordination).
- FY26-27 cycle — adopt #14 (GRAMA) before 7/1/2027 effective date.

1. Absenteeism and Truancy Prevention Policy (formerly Truancy Intervention / Attendance)

MODIFY | **Driver:** SB 58 (2026); HB 145 (2026) | **Effective:** 7/1/2026

Renames and restructures the Truancy Intervention Policy and Attendance Policy into a single Absenteeism and Truancy Prevention Policy aligned with R277-607.

Title — Renamed

Quest Academy ~~Truancy Intervention Policy~~ Absenteeism and Truancy Prevention Policy

► **Editor Note (R277-607 / SB 58 (2026)):** USBE rule R277-607 was amended to use the broader title and require a multi-tiered prevention framework, not solely truancy citation tracking.

Purpose Section

Success in school is dependent upon good attendance and school attendance is the responsibility of a parent or legal guardian. Quest Academy (the "School") is committed to preventing absenteeism through a tiered, evidence-based system of supports that addresses attendance barriers early and reserves court referral for habitual truancy that has not responded to intervention. Therefore, schools shall make every effort to encourage regular attendance for all students and to help parents in their responsibility to have their children attend school.

Tiered Intervention Framework — NEW Section

► **Editor Note (SB 58 (2026)):** SB 58 requires regular data reviews and tiered (MTSS-style) interventions before truancy citation.

The School shall implement a tiered intervention framework consistent with R277-607:

Tier 1 (Universal): Attendance expectations communicated at registration; positive recognition of regular attendance; weekly attendance monitoring by classroom teachers.

Tier 2 (Targeted): Triggered at 3 unexcused absences within a six-week period or 10% chronic absenteeism. Includes a parent meeting, attendance contract, root-cause assessment, and referral to school counselor or community resources.

Tier 3 (Intensive): Triggered at 7 unexcused absences in a 12-week period. Includes a multidisciplinary team meeting, individualized attendance plan, and where appropriate, referral to evidence-based alternative interventions (e.g., DJJYS prevention/early intervention services).

Excused Absences — Expanded

► **Editor Note (HB 145 (2026)):** HB 145 expanded excused absences to include any parent-provided reason if the student maintains a 2.0 GPA (e.g., mountain biking, shooting sports, USU youth dev programs, community-based clubs).

In addition to the excused-absence categories established by R277-419 (illness, family death, court appearance, family emergency, educational leave, school-approved activities), absences shall be excused if:

(a) The parent or guardian provides a written or electronic reason for the absence; AND

(b) The student maintains at least a 2.0 GPA.

Qualifying activities under this expanded provision include but are not limited to: youth athletic activities (e.g., mountain biking, shooting sports), USU youth development programs, community-based club activities, and family-directed educational experiences.

Toilet-Training Enrollment Provision — NEW

► **Editor Note (SB 58 (2026)):** SB 58 requires LEAs to address attendance/enrollment provisions for toilet-training-related absences.

A student in kindergarten or first grade shall not be unenrolled or referred for habitual truancy solely on the basis of toilet-training-related absences. The School shall, in consultation with the parent and school nurse, develop an individualized plan to support the student's continued enrollment.

Annual Internal Accuracy Review — NEW

► **Editor Note (SB 58 (2026)):** Annual internal review of attendance data accuracy is required.

The School shall conduct an annual internal review of attendance data accuracy before submitting absence reports to USBE. The review shall verify that attendance codes, excused/unexcused designations, and chronic-absenteeism flags are correctly applied. Findings of the review shall be presented to the Board.

Annual Board Review — NEW

► **Editor Note (SB 58 (2026)):** Board must annually review the policy and attendance outcomes.

The Board shall annually review this policy along with the attendance data summary, including chronic absenteeism rates, intervention outcomes, and any habitual-truancy referrals. The annual review shall be documented in board minutes.

Truancy Citations — Modified Trigger

Earnest and persistent efforts to resolve student attendance problems ~~may include the issuance of a truancy citation~~ shall include the tiered interventions described above. A truancy citation shall not be issued until Tier 2 and Tier 3 interventions have been documented as offered and either declined, ineffective, or non-responsive.

2. Acceptable Use / Electronic Device Use Policy (formerly Electronic Resources Policy)

MODIFY | **Driver:** SB 69 (2026); HB 44 (2026); SB 88 (2026); HB 273 (2026) | **Effective:** 7/1/2026

Definitions — Updated

"**Electronic device**" means a device that is used for audio, video, or text communication or any other type of computer or computer-like instrument including but not limited to: a cell phone or smart phone, a smart or electronic watch, a tablet, ~~or a virtual reality device;~~ a virtual reality device, augmented-reality glasses or AI glasses, and any wearable device capable of capturing or transmitting audio, video, or data.

► **Editor Note (HB 44 (2026)):** HB 44 expanded the definition to explicitly include AI glasses and emerging wearable devices.

Student Use of Electronic Devices — Default Ban During School Day

► **Editor Note (SB 69 (2026)):** SB 69 mandates default restriction of personal devices during ALL school hours, not just instructional time. The School may opt-in to allow non-instructional periods only.

~~Privately-owned electronic devices may be used before and after school hours and in the hallways during student passing periods.~~

Privately-owned electronic devices are restricted during all school hours by default. Students shall keep privately-owned electronic devices powered off and stored away (in a backpack, locker, or designated storage location) from arrival until dismissal. The Board may, by separate action, authorize use during specific non-instructional periods (e.g., before school, lunch). When authorized, such use remains subject to the standards in this section.

Filtering and Monitoring — NEW

► **Editor Note (SB 88 (2026)):** SB 88 requires both an obscene-material filter on School-owned devices and a parent-accessible monitoring tool.

The School shall implement and maintain technology protection measures on all School-owned electronic devices and the School network that filter or block access to obscene material, child pornography, and material harmful to minors. The filter shall be active during all uses by students.

The School shall provide parents with access to a monitoring tool or report mechanism by which the parent of an enrolled student may review the categories of internet activity, application use, or filtered/blocked attempts associated with that student's School-issued device. Access shall be granted upon written or electronic request.

Balanced Technology Use Provisions — NEW

► **Editor Note (HB 273 (2026)):** HB 273 requires LEAs to adopt the USBE model policy on balanced technology use (or an amended version adopted in a public meeting) before 7/1/2027.

By 7/1/2027 the Board shall adopt the USBE model policy on balanced technology use, or, after public discussion, an amended version of that model policy. The balanced-technology policy shall address screen-time limits, device-free instructional periods, criteria for selecting age-appropriate digital tools, and digital wellness instruction.

3. Criminal Background Check / Arrest Reporting Policy

MODIFY | **Driver:** SB 312 (2026) | **Effective:** 5/6/2026

Combines and updates the Background Check Policy and Arrest Reporting Policy. This redline reflects SB 312's tiered employment-restriction framework and the repeal of R277-516.

Statutory Citations — Updated

The School will comply with Utah Code § 53G-11-401 *et seq.* and Utah Administrative Code ~~R277-516~~R277-214 and R277-316 regarding employee background checks.

► **Editor Note (SB 312 (2026)):** R277-516 was repealed; the primary citation is now 53G-11-402 with implementing rules R277-214 and R277-316.

Employment Restriction Tiers — NEW Section

► **Editor Note (SB 312 (2026)):** SB 312 created a tiered framework of employment restrictions following licensure denial; the policy must reflect this framework.

When background-check or licensure information indicates an applicant or employee is subject to a Utah Professional Practices Advisory Commission ("UPPAC") action, the School shall apply employment restrictions according to the following tiered framework:

Tier 1 — Mandatory Disqualification: If the individual has a UPPAC restriction listed for serious misconduct (sexual misconduct with a minor, distribution of controlled substances on school premises, violent felony against a person, or other offenses identified in 53E-6-604), the School shall not employ the individual and shall not permit volunteer service. Existing employees subject to a Tier 1 restriction shall be dismissed.

Tier 2 — Conditional / Reviewable: Other UPPAC actions shall be reviewed individually by the Director in consultation with HR and legal counsel. The review shall consider time elapsed, nature of the offense, evidence of rehabilitation, and the position sought.

Tier 3 — Disclosure-Required: Where USBE has issued a public-disclosure letter without a categorical restriction, the School may employ the individual but shall document the review and approval in the personnel file.

Volunteers and Non-Licensed Staff — Expanded

► **Editor Note (SB 312 (2026); R277-316):** SB 312 made explicit that individuals with serious-misconduct restrictions may not be employed OR allowed to volunteer (paid or unpaid).

Individuals subject to a Tier 1 restriction (serious misconduct) shall not be permitted to volunteer at the School in any capacity, paid or unpaid, including but not limited to chaperoning field trips, classroom volunteering, coaching, mentoring, or assisting with school events.

4. LEA-Specific Educator License Policy

MODIFY		Driver: SB 312 (2026)		Effective: 5/6/2026
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Tiered Restrictions — NEW Section

► **Editor Note (SB 312 (2026)):** SB 312 imposes tiered employment restrictions upon licensure denial; the LEA-Specific Educator License Policy must reference these restrictions.

Where the Utah State Board of Education or UPPAC denies, suspends, restricts, or revokes an LEA-Specific Educator License, the School shall apply the tiered employment-restriction framework described in the Criminal Background Check / Arrest Reporting Policy. The School shall not issue a new LEA-Specific Educator License to an individual subject to a Tier 1 (mandatory disqualification) restriction.

Mandatory Dismissal for Serious Misconduct — NEW

► **Editor Note (SB 312 (2026)):** SB 312 requires mandatory dismissal for serious misconduct.

An employee holding an LEA-Specific Educator License who is found, through a UPPAC determination or comparable adjudication, to have committed serious misconduct as defined in Utah Code § 53E-6-604 shall be dismissed by the School. The dismissal shall be effected consistent with applicable due process and the School's employee discipline procedures.

5. Information Technology Security Policy / IT Systems Security Plan — Internet Safety (CIPA) Updates

MODIFY | **Driver:** HB 44 (2026) | **Effective:** 5/6/2026

HB 44 imposes minimum cybersecurity standards including a designated cybersecurity point person and 24-hour breach reporting to USBE. The redlines below update the existing IT Security Policy and IT Systems Security Plan; a separate stand-alone Cybersecurity Policy will be drafted to consolidate cybersecurity-specific obligations.

Cybersecurity Officer Designation — NEW

► **Editor Note (HB 44 (2026)):** HB 44 requires designation of a cybersecurity point person.

The Board hereby designates the [School's IT Security Manager / IT Director] as the School's Cybersecurity Officer. The Cybersecurity Officer is responsible for: implementing minimum cybersecurity standards adopted by USBE; coordinating with USBE on incident reporting; conducting annual cybersecurity risk assessments; and overseeing employee cybersecurity training.

Breach Reporting — 24-Hour Requirement

► **Editor Note (HB 44 (2026)):** HB 44 requires 24-hour breach notification to USBE.

School employees, volunteers, and third-party contractors shall immediately report a data breach or a suspected data breach to the Student Data Manager and the Cybersecurity Officer. Confirmed breaches affecting student or employee personally identifiable information shall be reported to the Utah State Board of Education within 24 hours of confirmation, in addition to any notifications required under R277-487 and Utah Code § 13-44-202.

Incident Response — Minor Update

All incidents of network or system shutdown or failure shall be reported to the IT Security Manager and Cybersecurity Officer immediately. The IT Security Manager and Cybersecurity Officer shall utilize industry standards and current best practices in responding to and resolving such incidents.

6. Meal Charge Policy

MODIFY		Driver: HB 148 (2026)		Effective: 5/6/2026
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USBE Annual Reporting — NEW

► **Editor Note (HB 148 (2026)):** HB 148 requires annual meal-debt data report to USBE by 6/30 with 5-year recordkeeping and 60-day refund of unused funds.

The School shall annually report to the Utah State Board of Education by June 30 the following data for the prior school year: total dollar amount of unpaid meal charges, number of households with unpaid charges, average unpaid balance per household, and amount of unpaid charges resolved through donation, write-off, or alternative means.

Recordkeeping — Updated

The School shall retain meal account records, including charge-tracking and debt-resolution records, for not less than five (5) years.

Refund of Unused Funds — NEW

► **Editor Note (HB 148 (2026)):** HB 148 requires return of unused balances within 60 days.

Upon a student's withdrawal, graduation, or other separation from the School, the School shall return any positive balance remaining in the student's meal account to the parent or guardian within sixty (60) days. The School shall make reasonable efforts to contact the parent or guardian; if no contact is made within the 60-day window, unused funds shall be processed in accordance with the Utah Unclaimed Property Act.

7. Open Enrollment / Lottery Policy (formerly Enrollment & Lottery)

MODIFY		Driver: SB 131 (2026)		Effective: 7/1/2026
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Title — Renamed

Quest Academy ~~Enrollment & Lottery Policy~~ Open Enrollment / Lottery Policy

Statutory Citations — Updated

The School will follow applicable laws in connection with its lottery and the enrollment of students, including Utah Code ~~§ 53A-1a-506.5~~ §§ 53G-6-502 and 53G-6-503 and R277-472-5 regarding notifying prospective students and parents and enrolling students.

► **Editor Note (SB 131 (2026)):** Citation update — the prior § 53A-1a-506.5 has been recodified.

Preferential Enrollment — Expanded

► **Editor Note (SB 131 (2026)):** SB 131 added enrollment preference for students residing within the political subdivision containing the charter school's primary location.

In accordance with Utah Code §§ 53G-6-502 and 53G-6-503, the following students shall receive preference in the School's lottery in the following order:

- (1) a child of an employee of the School;
- (2) a child or grandchild of a member of the School's Board of Directors;
- (3) a sibling of an individual who is presently enrolled in the School;
- (4) a student whose primary residence is within the political subdivision (city or county) containing the School's primary location.

Such students shall not, however, be given priority notice or guaranteed admission to the School.

8. Religious Expression in Public Schools Policy (formerly Religion & Education Policy)

MODIFY	Driver: SB 268 (2026)	Effective: 7/4/2026
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Title — Renamed

Quest Academy ~~Religion & Education Policy~~ Religious Expression in Public Schools Policy

Expanded Student Religious Expression — NEW Section

► **Editor Note (SB 268 (2026); 53G-10-203):** SB 268 expanded religious expression protections for students. The policy must explicitly protect student-led prayer and expression in school-sponsored settings, religious dress, and viewpoint neutrality.

Students retain the right to engage in voluntary religious expression to the same extent and on the same terms as comparable secular expression. Specifically:

(a) Student-Initiated Prayer and Expression: A student may pray or engage in religious expression individually or in groups during non-instructional times (before/after class, lunch, recess) and may incorporate religious viewpoints in coursework where the assignment permits the expression of personal viewpoint.

(b) School-Sponsored Speaking Opportunities: When a student is selected on the basis of neutral criteria to speak in a school-sponsored forum (e.g., student-of-the-month, graduation address), the student may include religious content; the School shall make clear, when appropriate, that the views expressed are the student's, not the School's.

(c) Religious Dress and Grooming: Students may wear clothing, accessories, or jewelry that displays religious messages or symbols to the same extent as comparable secular messages or symbols are permitted under the dress code.

(d) Religious Literature: Students may distribute religious literature on the same terms as comparable non-school literature is permitted.

Employee Religious Expression — NEW

Employees may engage in personal religious expression during non-duty time and to the same extent as comparable personal secular expression. Employees shall not lead, direct, or pressure students into religious activities and shall maintain viewpoint neutrality during instructional time.

9. School Fees Policy (formerly Fee Waiver Policy)

MODIFY | **Driver:** HB 142 (2026) | **Effective:** 7/1/2026

Title — Renamed

Quest Academy ~~Fee Waiver Policy~~ School Fees Policy

Second Waiver for School Trips — NEW

► **Editor Note (HB 142 (2026)):** HB 142 allows students on a fee waiver to request a second waiver for a school trip when accompanied by a director-approved action plan.

A student who has been granted a fee waiver may request a second waiver for a school-sponsored trip (curricular or co-curricular) during the same school year. The second-waiver request shall be accompanied by an action plan, approved by the Director, that addresses how the student or family will contribute to the cost of the trip through one or more of: (a) participation in approved fundraising; (b) approved service in lieu of fees consistent with R277-407 and the Fair Labor Standards Act; (c) installment-payment arrangements for ancillary trip costs not covered by waiver; or (d) other contributions specified in the action plan.

The second waiver shall be granted upon Director approval of the action plan unless documentation establishes the student's participation would impose an undue financial burden on the School beyond fee-waiver expectations.

10. Student Conduct and Discipline Policy

MODIFY | **Driver:** HB 299 (2026); SB 167 (2026); SB 181 (2026); HB 188 (2026) | **Effective:** 7/1/2026

Reintegration Plans — Tightened Timeline

► **Editor Note (SB 167 (2026)):** SB 167 tightened the reintegration plan timeline to 7 days.

In addition to complying with the requirements above, the School shall, within ~~five (5) days~~ seven (7) calendar days after receiving a notification described in Section 17.1.1 about a student, or within a reasonable time after otherwise being notified of a student committing a serious offense or sexual crime, develop a reintegration plan for the student with a multidisciplinary team, the student, and the student's parent or guardian.

Response to Student Arrests and Charges — NEW

► **Editor Note (HB 299 (2026)):** HB 299 requires the School to adopt a policy for responding to student arrests/charges for serious or sexual offenses.

Upon notification by law enforcement, a parent, or other reliable source that an enrolled student has been arrested for or charged with a serious offense (as defined in 53G-8-211) or a sexual offense, the Director shall:

(a) Within 24 hours, convene a school safety review including the Director, Resource Officer (if any), and the Threat Assessment Team to evaluate immediate risk to students and staff;

(b) Determine whether the student should attend School pending the outcome of the case, attend with conditions, or be temporarily removed (for safety reasons), consistent with due process and applicable special-education protections;

(c) Coordinate with juvenile court, the Division of Juvenile Justice and Youth Services, and any victim's family enrolled at the School;

(d) Document the safety review and decision in a confidential file maintained per GRAMA classifications and FERPA.

Student Searches — Updated Standard

► **Editor Note (HB 188 (2026)):** HB 188 codified the reasonable-belief standard, evidence handoff to law enforcement, and disposal procedures for confiscated e-cigarettes.

School officials may conduct an administrative search of a student's person, possessions, locker, or other school-controlled space upon reasonable belief that the search will produce evidence of a violation of law or School rules. "Reasonable belief" requires more than a hunch but does not require probable cause.

Items seized that constitute evidence of a crime (including controlled substances, weapons, and stolen property) shall be turned over to a law enforcement officer with documented chain of custody (date/time of seizure, item description, transferring official, receiving officer).

Confiscated electronic cigarettes, vape devices, and similar nicotine-delivery products that are not retained as evidence shall be disposed of by the Director or designee in a manner that prevents reuse, with disposal documented in the discipline file.

Cross-Reference to Restraint and Seclusion Policy — NEW

► **Editor Note (SB 181 (2026)):** SB 181 created stand-alone restraint and seclusion standards. The Student Conduct policy should cross-reference the new Restraint and LRBI Policy rather than duplicating it. Quest Academy does not use seclusion.

The use of physical restraint or other emergency safety interventions is governed by the Restraint and Least Restrictive Behavior Interventions (LRBI) Policy. Quest Academy does not use seclusion. School officials shall comply with that policy in lieu of any conflicting provision in this Policy.

11. Student Data Privacy & Security Policy / Data Governance Plan

MODIFY	Driver: SB 296 (2026); SB 152 (2026); HB 55 (2026)	Effective: 7/1/2026
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Digital Consent Mechanism — NEW

► **Editor Note (SB 296 (2026)):** SB 296 requires a digital consent mechanism by 7/1/2027.

By July 1, 2027, the School shall implement a digital consent mechanism through which parents may grant, modify, or withdraw consent for: (a) sharing of personally identifiable information ("PII") with third-party educational technology vendors; (b) participation in optional data-collection programs; (c) inclusion in directory information disclosures. The digital consent mechanism shall provide an audit trail of consent changes and shall be accessible from the parent portal.

Higher Education Data Sharing — NEW

► **Editor Note (SB 152 (2026)):** SB 152 requires parent notice and opt-out before sharing student data with Higher Education institutions.

Before sharing student personally identifiable information with a Utah System of Higher Education institution (or any institution of higher education) for purposes such as concurrent enrollment, dual enrollment, or post-secondary recruiting, the School shall provide written notice to the parent and offer an opt-out. The notice shall identify the specific institution, the data elements to be shared, the purpose, and the retention period.

Vendor Contracts — 30-Day Termination Clause

► **Editor Note (HB 55 (2026)):** HB 55 requires ed-tech vendor contracts to include 30-day termination clauses.

All contracts with educational technology vendors that involve access to student personally identifiable information shall include: (a) a termination-for-convenience clause permitting either party to terminate on no more than 30 days' written notice; (b) a data-return or data-destruction clause triggered upon termination; and (c) a liquidated-damages or remedy provision in the event of a material breach of data-protection obligations.

12. Health and Welfare Policy (formerly Health Examination Policy + Wellness coordination)

MODIFY | **Driver:** SB 244 (2026); HB 351 (2026) | **Effective:** 7/1/2026

Cardiac Response — Cross-Reference to New Stand-Alone Policy

► **Editor Note (SB 244 (2026)):** Cardiac response and AED placement now governed by a new stand-alone Cardiac Emergency Response Plan Policy (to be drafted separately).

~~The School shall maintain at least one automated external defibrillator (AED) per school site. The AED shall be examined monthly and a minimum of two employees shall be certified in CPR/AED.~~

Cardiac emergency preparedness — including AED placement and inspection, CPR/AED training, response team designation, and drill schedule — is governed by the Cardiac Emergency Response Plan Policy adopted under SB 244 (2026).

Health Screening Follow-Up — NEW

► **Editor Note (HB 351 (2026)):** HB 351 requires follow-up with parents on health screening results.

Following any school-administered health screening (vision, hearing, scoliosis, oral health, mental health), the School shall provide written results to the parent within ten (10) school days. If results indicate a concern that warrants further evaluation, the School shall: (a) notify the parent of the recommended next step; (b) provide referral information for community providers; (c) document a follow-up contact within 30 calendar days to confirm receipt of the notification and offer additional support; and (d) maintain documentation of the follow-up in the student's health file consistent with FERPA.

13. Student Credit Policy (formerly Credit Evaluation Policy)

MODIFY		Driver: HB 358 (2026)		Effective: 7/1/2026
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Title — Renamed

Quest Academy ~~Credit Evaluation Policy~~ Student Credit Policy

Credit Definition — NEW

► **Editor Note (HB 358 (2026)):** HB 358 sets minimum 83 class hours per credit for attendance-validated 9-12 programs.

For attendance-validated programs in grades 9 through 12, one (1) credit shall represent at least eighty-three (83) class hours of instruction. "Attendance-validated" means a course in which credit is awarded based primarily on time-in-seat (in addition to demonstration of learning standards) rather than competency-only completion.

This minimum hour requirement does not apply to: (a) competency-based programs; (b) Adult Education credit awarded under R277-733; (c) credit awarded through demonstrated mastery under the School's Course Substitution Policy; or (d) concurrent enrollment credit awarded by a Utah System of Higher Education institution.

14. Government Records Access and Management Act (GRAMA) Policy

MODIFY		Driver: HB 147 (2026)		Effective: 7/1/2027
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Electronic Submission Option — NEW

► **Editor Note (HB 147 (2026)):** HB 147 requires electronic-submission options for records requests by 7/1/2027 (delayed to 1/1/2030 for entities meeting specific criteria).

A person requesting a record must make a written request directed to the records officer. Beginning July 1, 2027, the School shall make available an electronic form for the submission of GRAMA requests on the School's website. The electronic form shall: (a) capture the same information required by Utah Code § 63G-2-204; (b) automatically generate an acknowledgment to the requester; and (c) route the request to the Records Officer. The School may continue to accept paper requests submitted in person or by mail.

15. Special Education Policies & Procedures Manual (separate document)

MODIFY	Driver: HB 143 (2026); HB 448 (2026); SB 81 (2026)	Effective: 7/1/2026
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The Special Education Policies & Procedures Manual is maintained as a separate document. Detailed redlines for that manual are not included here; the principal changes required are summarized below for coordination.

HB 143 — 30-Day Advance Notice

► **Editor Note (HB 143 (2026)):** HB 143 requires 30-day advance written notice to SPED families before boundary, attendance-zone, or program-location changes.

Add provision: "Before any boundary, attendance-zone, or program-location change that would affect a student receiving special education services, the School shall provide written notice to the student's parent or guardian not less than thirty (30) calendar days in advance. The notice shall describe the proposed change, anticipated effective date, impact on IEP services or placement (if any), and contact information for questions."

HB 448 — USDB Partnership

► **Editor Note (HB 448 (2026)):** HB 448 updates USDB (Utah Schools for the Deaf and the Blind) partnership rules.

Update USDB partnership language consistent with the revised partnership rules — specifically the consultation/IEP-team-membership provisions and service-delivery provisions. Coordinate with USDB and USBE Special Education Services on specific contract or interlocal-agreement updates.

SB 81 — Individualized Intervention

► **Editor Note (SB 81 (2026)):** SB 81 requires individualized interventions when assessments indicate a need.

Add provision: "When initial or ongoing assessments indicate that a student needs targeted intervention (especially for dyslexia or other reading-based disabilities), the IEP team shall consider individualized evidence-based interventions and document the consideration and decision in the IEP."

Closing Notes

This document covers all policy modifications required by 2026 Utah General Session legislation effective after April 1, 2026.

Action Items

- Review each redlined section; accept or reject changes.
- Replace bracketed placeholders [LIKE THIS] with Quest-specific values (especially in Policy #5 — Cybersecurity Officer designation).
- Coordinate Special Education Manual updates (Policy #15) with the SPED team since that is a separate document.
- Confirm renamed policy titles are reflected in the master Policies & Procedures Manual table of contents.
- Schedule board adoption per recommended sequence (May 2026 → June 2026 → FY26-27 cycle for GRAMA).
- New stand-alone policies (e.g., AI Use Policy, Cardiac Emergency Response Plan, Threat Assessment, School Security, Restraint, Cybersecurity, etc.) require separate drafts and are not included here.

Cross-References

Several redlines in this document reference new stand-alone policies. When those policies are drafted, ensure these cross-references resolve correctly:

- Policy #5 (IT Security/Internet Safety) → Cybersecurity Policy (new)
- Policy #10 (Student Conduct) → Restraint and LRBI Policy (new); Threat Assessment Policy (new)
- Policy #12 (Health and Welfare) → Cardiac Emergency Response Plan Policy (new)

End of Document.

Quest Academy

Wellness Policy — Summary of Changes

Original: Old Policy (PDF, QA Policies & Procedures Manual pp. 372–380) | Updated: DRAFT 05-21-2026

Overview

The 2026 update to the Quest Academy Wellness Policy is a comprehensive expansion — transforming a focused 1-page preamble into a full, multi-section wellness policy aligned with Utah state law, USDA requirements, and the Alliance for a Healthier Generation model wellness policy. The original policy (PDF) contained a preamble and basic sections on Nutrition, Physical Activity, Community Health, and Staff Wellness. The updated DRAFT policy retains and revises those sections while adding substantial new content across health, mental health, disease management, substance misuse prevention, injury prevention, and monitoring.

Total changes identified: 30+ individual additions, revisions, and deletions across all sections.

Key additions: Mental Health (full section), Substance Misuse Prevention & Intervention, Injury Prevention, Chronic Disease Management, Medication Management, Monitoring and Evaluations, Air Quality, Sun Safety, Health Screenings, Period Products, Eating Time, Celebrations & Rewards, Special Diets, School Wellness Committee Leadership, Wellness Policy Implementation/Monitoring/Accountability.

Change Summary Table

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
Preamble — Opening Sentence	REVISED	"...committed to the optimal development of every student. The School believes that for students to have the opportunity to achieve personal, academic, developmental and social success, it needs to create positive, safe and health-promoting learning environments at every level, in every setting, throughout the school year."	"...committed to the optimal development of each student. This policy outlines the model approach to ensuring environments and opportunities for all students to practice lifelong healthy habits that promote physical, mental, and social health."
Preamble — Research Paragraph	REVISED	Focused on two components (nutrition + physical activity); cited standardized test scores, fruits/vegetables/dairy, hydration. Ended with "This policy outlines the School's approach..."	Expanded to include mental and social health; removed dairy/hydration details; streamlined. Added new paragraphs on: chronic health conditions (asthma, diabetes, seizures), mental health conditions (1-in-5 statistics, risk factors, ACEs).

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
Preamble — Bullet List (7 items)	REVISED	Seven-bullet list covering: healthy foods, nutrition education, physical activity, school engagement, staff health, community continuity, and infrastructure.	Replaced with expanded prose: Quest Academy community roles named (parents, students, food service, nurses, LEA board, administrators); self-evaluation tool mentioned. Bullets removed in favor of narrative.
Preamble — Closing Line	REVISED	"Specific measurable goals and outcomes are identified within each section below."	"Goals and outcomes are identified within each section below." (simplified)
School Wellness Committee — Leadership Subsection	NEW	—	Added Leadership subsection: Principal convenes committee, makes member names/contact info available, and designates a wellness policy coordinator.
Wellness Policy Implementation (entire section)	NEW	—	Entirely new section added covering: Implementation Plan, Recordkeeping (6-item documentation list), Annual Notification of Policy, Triennial Progress Assessments (every 3 years), Revisions and Updating the Policy, Community Involvement/Outreach/Communications.
Nutrition — School Meals Bullets	REVISED	5 simple NSLP bullets: accessible to all students; appealing/attractive; clean settings; meet nutrition requirements; promote healthy choices.	Expanded to 6 bullets: Added "including those with unpaid lunch balances"; added fresh fruits/veg display language; added Smart Snacks reference; added food items in other venues (vending, stores, events, concessions).
Nutrition — School Nutrition Professionals	NEW	—	New subsection added: School Nutrition Professionals must meet minimum education requirements, receive annual professional development, inform parents of Free/Reduced Meal options, and maintain confidentiality of program participants.
Nutrition — Eating Time	NEW	—	New subsection: minimum 10 min for breakfast, 20 min for lunch (excludes travel/wait time); meals at appropriate time of day; lunch follows recess when possible; considerations for diabetes/hypoglycemia.
Nutrition — Celebrations and Rewards	NEW	—	New subsection: Quest Academy shall not use food as reward/incentive; teachers/parent groups receive non-food reward list; food/beverages shall not be withheld as punishment.

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
Nutrition — Nutrition Education	REVISED	3-bullet list: healthy eating habits taught in learning skills; food not used as punishment/reward; promote safety by partnering with law enforcement.	6-bullet list aligned to Utah Core Standards (R277-700); grades K–6/middle/high school; culturally appropriate curriculum; links cafeteria to classroom; agriculture education chapters; teacher training.
Nutrition — Special Diets	NEW	—	New subsection: menus accommodate cultural preferences/allergies; written procedure for meal modification requests; cross-functional team (504 coordinator, nurse, foodservice director, teachers) to ensure accommodations, confidentiality, and parent involvement. USDA guidance referenced.
Physical Activity — Fitness Minutes (Elementary)	REVISED	"75 minutes of fitness education per week, schedule permitting."	"90–120 minutes of fitness education per week, schedule permitting." (increased minimum)
Physical Activity — Anti-Punishment Bullet	NEW	—	Added: "Physical activity during the school day shall not be withheld as punishment for any reason. Teachers and other school personnel shall not use physical activity (e.g., running laps, push-ups) as punishment. Quest Academy shall provide staff with a list of alternative ways to discipline students."
Physical Activity — Grounds/Facilities Bullet	NEW	—	Added: "To the extent practicable, Quest Academy shall ensure that its grounds and facilities are safe, and that equipment is available to students to be active. The LEA shall conduct necessary inspections and repairs."
Physical Education — Secondary Students	REVISED	"Secondary students are required to take the equivalent of one academic year of physical education."	"Secondary students shall take a minimum of one physical education course in middle school (R277-700)." (added rule citation, narrowed to middle school)
Recess — IDEA Subsection	NEW	—	New IDEA subsection added: requires students with disabilities to participate with nondisabled children to maximum extent appropriate; physical education services must be available to every student with a disability; LEA must ensure equal opportunity for extracurricular athletic activities.
Recess — Duplicate Paragraph Removed	DELETED	"Quest Academy shall provide recess monitors or teachers to encourage students to be active..."	Second instance removed; single paragraph retained.

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
		(appeared twice in old policy)	
Community Health — Annual Event Name	REVISED	"...invited to participate in School-sponsored activities (such as the annual 5K)."	"...such as the annual Quest Fest)." (event renamed)
Community Health — Air Quality	NEW	—	New subsection: minimize indoor air pollutants; control temperature/humidity/ventilation; monitor outdoor air pollution and provide safe recess alternatives; limit idling at drop-off/pick-up zones. References Utah DOH Air Quality Recess Guidance and Air Quality Flag Program.
Community Health — Sun Safety	NEW	—	New subsection: Utah's high skin cancer rate; schedule recess to minimize UV exposure; promote hats/sunglasses/sunscreen; uniform/clothing guidelines; occupational hazard recognition. References Utah Code 53G-9-208 and USBE Health Education Core Standards.
Community Health — Health Screenings	NEW	—	New subsection: optional screenings (oral health, height/weight, hearing); mandatory vision screening (Utah Code 53G-9-404); parent/guardian notification and right to exclude student from screenings.
Community Health — Period Products	NEW	—	New subsection: Quest Academy will provide period products at no cost in all female and unisex restrooms (Utah Code 53G-4-413 and 53G-5-414).
Community Health — Substance Misuse Prevention & Intervention	NEW	—	Major new section: alcohol/tobacco/drug effects on developing brain; standards of conduct (R277-613, Utah Code 53G-8-209); annual distribution of conduct rules; evidence-based prevention programs (Botvin's LifeSkills Training for grades 4/5, 7/8, 9/10); prevention principles for elementary and secondary; substance use intervention procedures including progressive discipline and law enforcement reporting.
Community Health — Injury Prevention	NEW	—	New subsection: child sexual abuse prevention training (Utah Code 53G-9-207); suicide prevention/intervention/postvention policies; violence prevention policies (inclusive of LGBTQIA+ students);

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
			connectedness as protective factor; annual QPR/Mental Health First Aid training; parent seminars on TBI, bullying, suicide, internet safety (Utah Code 53G-9-702); concussion protocols (Utah Code 26B-4-404); seatbelt reminder signage.
Staff Wellness — Lactation/Nursing Accommodation	NEW	Briefly mentioned staff role modeling only.	Expanded with detailed Federal Break Time for Nursing Mothers law requirements: private space for milk expression, flexible breaks (every ~3 hours), schedule accommodations for up to 1 year post-birth, and supportive workplace attitude.
Chronic, Infectious & Acute Disease Management	NEW	—	New section: minimum 1 registered school nurse; AED per school with monthly inspection; minimum 2 CPR/first aid certified staff; individualized healthcare plans (IHP/EAP) for delegated medical tasks (R156-31b-701a); seizure awareness training every 3 years (Utah Code 53G-9-213); links to UDOH simplified IHP/EAP forms.
Medication Management	NEW	—	New section: medication access per Utah Code 53G-9-502; self-administration authorized for epinephrine auto-injectors, asthma medication, diabetes medication; allergy/anaphylaxis protocols (stock epinephrine per Utah Code 26B-4-406); stock albuterol for asthma emergencies; seizure rescue medication procedures (Utah Code 53G-9-505); 911 instruction when paperwork not submitted.
Mental Health (entire section)	NEW	—	Major new section: definition per R277-625; mental health as continuum; Prevention (School Climate Survey per R277-623, Tier 1 efforts including bullying/dropout/substance use/suicide prevention); Education (Health Education Core Standards K–12); Mental Health Screening (Board Rule R277-625, approved tools, depression/anxiety/suicidal ideation only, written parental consent); Intervention (tiered support, individual/group counseling, community mental health contractors, parental consent per 53E-9-203, suicide/self-harm exceptions); Recovery/Return to Learn (transition plan with community providers).

Section	Type	Original (Old Policy — PDF)	Updated (05-21-2026 DOCX)
Monitoring and Evaluations	NEW	—	New section: annual monitoring of Health and Wellness Policy; Assessment Resources listed: LEA Wellness Policy Evaluation Tool (USB), triennial USDA FNS assessment, WellSAT quantitative scoring tool.
Document Status / Footer	REVISED	"Page 372 of 380 — QA Policies and Procedures Manual" (final approved policy)	"DRAFT: 05.21.2026 — QA Policies and Procedures" (marked as draft)

Key Themes in the Update

1. Mental and Social Health Added Throughout

The original policy focused primarily on physical health and nutrition. The update explicitly incorporates mental health at every level — in the preamble (mental illness statistics, risk factors), in a dedicated Mental Health section (prevention, screening, intervention, recovery), and in the Physical Activity section (promoting 'physical, mental, emotional and social well-being').

2. Chronic Disease and Medical Management

New sections on Chronic/Infectious & Acute Disease Management and Medication Management add detailed protocols for conditions including asthma, diabetes, allergies/anaphylaxis, and seizures — each citing specific Utah statute or administrative rule. Requirements for AEDs, CPR certification, individualized healthcare plans (IHPs/EAPs), and school nurse delegation are now codified.

3. Substance Misuse Prevention — Comprehensive Framework

A new Substance Misuse Prevention and Intervention section formalizes Quest Academy's approach with three tiers: clear standards of conduct (citing R277-613), evidence-based prevention programming (Botvin's LifeSkills Training, R277-910), and intervention/progressive discipline procedures. Prevention principles for elementary vs. secondary students are detailed separately.

4. Injury Prevention and Safety Protocols

A new Injury Prevention subsection adds school policy requirements for child sexual abuse prevention training, suicide prevention/postvention, violence prevention (with LGBTQIA+ inclusive language), concussion protocols (Utah Code 26B-4-404), annual staff suicide prevention training, and parent education seminars.

5. Policy Governance and Accountability

The update establishes formal governance infrastructure absent from the old policy: a named School Wellness Committee with leadership roles, Implementation Plan, Recordkeeping requirements, Annual Notification procedures, Triennial Assessments (required by USDA FNS for NSLP participants), and three named Assessment Resources (LEA Evaluation Tool, USDA FNS triennial, WellSAT).

6. Student-Centered Nutrition Protections

New Nutrition subsections address Eating Time minimums (10 min breakfast, 20 min lunch), Celebrations and Rewards prohibitions on food-as-incentive, and Special Diets accommodations — including a cross-functional team tasked with ensuring every student with dietary needs receives appropriate accommodations with confidentiality protections.

7. Physical Activity Strengthened

Two important physical activity additions: fitness education minutes increased from 75 to 90–120 minutes per week for elementary students; and a new anti-punishment policy prohibiting withholding physical activity or using it as discipline. An IDEA subsection formalizes equal-opportunity participation for students with disabilities.

8. Community Health Expanded

Three new environmental/community health subsections — Air Quality, Sun Safety, and Health Screenings — add proactive practices for student safety. The annual school event reference was updated from '5K' to 'Quest Fest.' A new Period Products subsection mandates free period products in all female and unisex restrooms per Utah Code.

Quest Academy

Parent & Family Engagement Policy — Summary of Changes

Original Policy: Board Approved 10-11-2022 | Updated Policy: Board Approved 05-21-2026

Overview

The 2026 update to the Quest Academy Parent & Family Engagement Policy strengthens the document by adding new participation structures, specifying communication channels more concretely, updating committee references to reflect current organizational structure, and making minor editorial improvements. The core ESSA Section 1116 requirements remain unchanged.

The table below details each change, its location in the document, and the original versus updated language.

Change Summary Table

Section	Type	Original (2022)	Updated (2026)
Board Approval / Revision	REVISION	Board Approved: 10-11-22; labeled REVISION A	Board Approved: 05-21-2026; REVISION A label removed
Section Heading — Accessibility	REVISION	"Parents and Family Members of Children Learning English"	Renamed to "Accessibility: Parents and Family Members of Children Learning English"
Joint Development — Community Council (new bullet)	ADDITION	N/A (new content)	Added: During meetings of the School Community Council, parents are included in planning, reviewing, and improvement of programs, including the PFEP, School-Parent Compact, and Teacher Student Success Act Plan.
Joint Development — POQA (new bullet)	ADDITION	N/A (new content)	Added: Provide parent participation and volunteer opportunities through the Parent Organization Quest Academy (POQA).
Joint Development — Proficiency Levels	REVISION	"The School and state websites will provide parents with information related to expected student proficiency levels."	"Parents will be provided with information related to expected student proficiency levels through a printed Parent Assessment Report, RAM report, parent email, teacher newsletter and school and state websites."
Joint Development — School Website	REVISION	"The School website will provide parents with a description and explanation of the School's curriculum, mission, calendar information, policies..."	"The School website and student handbook will provide parents..." (added "and student handbook")
Joint Development — Annual Title I	ADDITION	N/A (new content)	Added new standalone bullet: "Annual Title I Meeting. Parents are invited to an Annual Title I

Section	Type	Original (2022)	Updated (2026)
Meeting (new section)			meeting which aims to inform parents of the Title I requirements, our schools' involvement in the program and parent rights to partner with the school in the Title I program."
Communications — New Bullet	ADDITION	N/A (new content)	Added: "Communicate information via email, school website, RAM report, social media, teacher newsletters, phone calls, parent conferences, parent meetings, and family nights."
Building Capacity — Curriculum-Based Assessments	REVISION	"...other appropriate curriculum based assessments." (no hyphen)	"...other appropriate curriculum-based assessments." (hyphen added)
Building Capacity — Progress Reports	REVISION	"Providing progress reports to parents to communicate their student's academic performance throughout the school year."	Added specific delivery methods: "...through printed Parent Assessment Report, RAM reports, parent email, teacher newsletter and school and state websites."
Building Capacity — Communication Channel	REVISION	"...through the School's LAND Trust Committee."	"...through the School's Community Council and Curriculum Committee."
Review Section	REVISION	"...this policy, the school-parent compact, and the targeted assistance or schoolwide program plan..."	"...this policy, the school-parent compact, and the targeted assistance plan..." (simplified)

Key Themes

1. New Participation Structures

Three substantive additions formalize participation channels that may have existed informally:

- School Community Council: parents are now explicitly named as participants in program planning, review, and improvement through SCC meetings, including the PFEP, School-Parent Compact, and TSSA Plan.
- Parent Organization Quest Academy (POQA): a new bullet formalizes volunteer and participation opportunities through POQA.
- Annual Title I Meeting: a dedicated section was added calling out the annual Title I informational meeting and its purpose — informing parents of requirements, school involvement, and parent rights.

2. More Specific Communication Methods

Where the original policy described communication in general terms, the update names specific tools and channels:

- A new Communications bullet lists: email, school website, RAM report, social media, teacher newsletters, phone calls, parent conferences, parent meetings, and family nights.
- Progress reports now specify delivery through printed Parent Assessment Report, RAM reports, parent email, teacher newsletter, and school/state websites (rather than a generic reference to 'progress reports').
- Proficiency level information now specifies delivery channels (printed report, RAM report, email, newsletter, websites) rather than just 'the School and state websites.'

3. Updated Committee References

The LAND Trust Committee reference in the Building Capacity of Parents section has been replaced with the Community Council and Curriculum Committee, reflecting the current governance structure at Quest Academy.

4. Editorial & Structural Updates

- "curriculum based assessments" corrected to "curriculum-based assessments" (hyphen added).
- Section heading updated from "Parents and Family Members of Children Learning English" to "Accessibility: Parents and Family Members of Children Learning English."
- "targeted assistance or schoolwide program plan" simplified to "targeted assistance plan" in the Review section.
- "The School website" updated to "The School website and student handbook" to reflect that the student handbook also carries key policy information.
- The REVISION A designation was removed from the footer; the Board Approval date was updated to 05-21-2026.

Quest Academy

Salary Supplement for Highly Needed Educators Program Policy



PURPOSE

The purpose of this policy is to describe how Quest Academy (the “School”) administers the Salary Supplement for Highly Needed Educators (“SHiNE”) Program. This policy is meant to comply with the requirements of Utah Code § 53F-2-504.

DEFINITIONS

“Eligible teacher” means a teacher who:

- (a) has a qualifying assignment;
- (b) qualifies for the teacher’s assignment in accordance with an LEA’s policy; and
- (c) is a new employee or has not received an unsatisfactory rating on the teacher’s three most recent evaluations.

“Qualifying assignment” means a teacher who is assigned to a high-needs area.

“High-needs area” means at least two and up to five teaching assignments that an LEA designates in a policy as challenging to fill or retain.

POLICY

High-Needs Areas

The following teaching assignments are designated as high-needs areas at the School:

- (a) Special Education (6-9);
- (b) Science (6-9);
- (c) Math (6-9); and
- (d) Elementary (K-5).

Process for Determining if a Teacher is an Eligible Teacher

The School’s Principal or his/her designee shall perform due diligence in determining whether a teacher meets the definition of eligible teacher as set forth in this policy. Due diligence includes, at a minimum, verifying that a teacher:

- (a) is assigned to teach in one of the high-needs areas listed above;
- (b) is qualified to teach in the high-needs area (qualification factors to consider include, but are not limited to, licensure, training, education, experience, and skills); and
- (c) is a new employee of the School or is not a new employee of the School but has not received



an unsatisfactory rating on the teacher's three most recent evaluations from the School.



On an annual basis, the School's Principal or his/her designee shall create a list of all teachers who have been determined to meet the definition of eligible teacher under this policy.

Process for Certifying a List of Eligible Teachers to be Awarded a Salary Supplement

On an annual basis, the School's Principal or his/her designee shall review the list of all teachers who have been determined to meet the definition of eligible teacher under this policy and shall make any changes to the list he/she feels is necessary. The list is considered certified by the School's Principal or his/her designee when he/she sends, or causes to be sent, the list to payroll for processing of the salary supplement payment under the SHiNE Program.

Salary Supplement Amount

All teachers at the School determined to be eligible teachers under this policy (i.e., all teachers on the certified list described above) shall receive a salary supplement under the SHiNE Program in an amount commensurate with the funds allocated to and received by the School under the SHiNE Program. Eligible teachers who are assigned 1.0 FTE in a high needs area shall receive the full salary supplement. Eligible teachers who are assigned less than 1.0 FTE in a high needs area shall receive a prorated salary supplement based on the percentage of their FTE in the high needs area.

The School may increase the amount of funds the School provides to eligible teachers if the School:

- (a) first ensures proper distribution of funds the School receives under the SHiNE Program to the School's eligible teachers; and
- (b) experiences a carry forward or leftover balance.

Appeals

If the School's Principal or his/her designee determines that a teacher does not meet the definition of eligible teacher and therefore does not qualify for a salary supplement under the SHiNE Program, the teacher may appeal that decision in writing to the School's Board of Directors (the "Board") if the teacher:

- (a) believes he/she does meet the definition of eligible teacher under this policy; or
- (b) has a teaching assignment at the School that is substantially equivalent to a high-needs area and otherwise meets the definition of eligible teacher under this policy.

When submitting an appeal, a teacher is required, at minimum, to provide transcripts and other documentation to the Board in order for the Board to determine if the teacher is an eligible teacher with a qualifying teaching background.

The Board shall make a decision on the appeal within thirty (30) school days.



Administrative Procedures

Each school year the Principal shall establish, through administrative procedures, the salary supplement amount that each eligible teacher will receive for that school year.

Updating Policy

The School shall update this policy annually and provide notice of any changes the policy to teachers within the School.





Quest Academy

Emergency Recovery Plan (Post-Incident)

Effective Date: May 1, 2026
Reviewed Annually: May 2026

I. Purpose

The purpose of this Emergency Recovery Plan is to establish clear, compliant procedures for post-incident recovery that ensure:

- Safety and stabilization of the school environment
- Continuity of learning and operations
- Support for physical, emotional, and behavioral needs
- Alignment with Utah law and state expectations

This plan aligns with:

- Utah Code §53G-8 (Safe Schools)
 - Utah Administrative Rule R277-400
 - Utah School Safety Playbook (2024)
 - Standard Response Protocol (SRP)
-

II. Recovery Framework

All recovery efforts will be organized into the following **four required domains**:

1. **Education / Academics**
2. **Business Services / Operations**
3. **Physical & Structural (Facilities)**
4. **Health, Wellbeing, and Behavioral Supports**

Each domain includes immediate, short-term, and long-term actions.

III. Recovery Team Structure

A. Core Team

- Director
 - Principals
 - School Safety and Security Director
 - School Safety & Security Specialist (SSSS)
 - Academic Lead (Instruction/Director)
 - Business Manager
 - Facilities Lead
 - Mental Health/Counseling
 - Communications Lead
-

IV. Domain 1: Education / Academics Recovery

A. Immediate (0–24 Hours)

- Determine status of instruction (pause, relocate, or resume)
- Communicate expectations to staff and families
- Ensure access to essential instructional materials

B. Short-Term (1–3 Days)

- Implement modified schedules if needed
- Prioritize core instruction and stability
- Provide flexibility for assignments and assessments

C. Long-Term

- Address learning loss through targeted interventions
 - Monitor student progress using existing data systems (Acadience, RISE, etc.)
 - Ensure continuity for:
 - Special Education (IEPs)
 - English Learners
 - At-risk students
-

V. Domain 2: Business Services / Operations Recovery

A. Immediate (0–24 Hours)

- Secure financial systems, student records, and data systems
- Confirm payroll, HR, and essential services continuity
- Activate emergency vendor support if needed
- Legal representation if needed

B. Short-Term

- Maintain:
 - Food services
 - Technology access
- Track incident-related costs for reimbursement or reporting

C. Long-Term

- Restore full operational capacity
 - Review contracts, insurance claims, and financial impact
 - Ensure compliance with procurement and reporting requirements
-

VI. Domain 3: Physical & Structural Recovery

A. Immediate (0–24 Hours)

- Coordinate with first responders to assess building safety
- Restrict access to unsafe areas
- Conduct initial damage assessment

B. Short-Term

- Arrange for temporary relocation if needed
- Begin repairs and safety mitigation
- Ensure utilities (water, electricity, HVAC) are functioning

C. Long-Term

- Complete full restoration of facilities
 - Conduct safety inspections and approvals prior to re-entry
 - Evaluate infrastructure improvements to prevent future risk
-

VII. Domain 4: Health, Wellbeing, and Behavioral Recovery

A. Immediate (0–24 Hours)

- Provide crisis counseling and emotional support
- Identify high-risk students and staff
- Assist in obtaining medical care if needed

B. Short-Term

- Offer structured opportunities for students and staff to process the event
- Provide staff guidance on supporting students
- Communicate available mental health resources to families

C. Long-Term

- Continue counseling and behavioral supports as needed
 - Monitor for delayed trauma responses
 - Partner with community agencies for additional services
-

VIII. Communication Protocols

A. Staff Communication

- Provide clear, accurate, and timely updates
- Share expectations for recovery phases

B. Family Communication

- Initial notification as soon as feasible
- Follow-up within 24 hours
- Ongoing updates as recovery progresses

C. Media Communication

- All communication routed through designated spokesperson
 - Coordinate with law enforcement and LEA leadership
-

IX. Continuity of Operations

The school will ensure continuity of:

- Instruction (in-person or virtual)
- Special education services
- Student support services
- Food and essential services

- Technology systems
-

X. Compliance and Reporting

Following an incident, the school will:

- Document all actions taken
 - Complete required state and local reporting
 - Review adherence to:
 - Utah Code §53G-8
 - Utah Administrative Rule R277-400
 - Maintain records for audit and review
-

XI. After-Action Review

Within a reasonable timeframe:

- Conduct a formal debrief
 - Identify strengths and gaps
 - Update safety and recovery procedures
 - Provide additional staff training if needed
-

XII. Plan Maintenance

- Reviewed annually
- Updated after any major incident
- Approved by governing board

School-based Mental Health Qualifying Grant Program (New Applicant)

Applicant Organization Quest Academy	Form Completed Yes
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Overview

Overview

The state board shall distribute money appropriated under this section to local education agencies (LEAs) to provide, in a school, targeted school-based mental health support, including clinical services and trauma-informed care, through employing or entering into contracts for services provided by qualifying personnel or employing behavioral health support personnel.
Please direct all questions to SBMHQualifyingGrant@schools.utah.gov

Supporting Documents

- Frequently Asked Questions (FAQ) Document
- Utah Code 53F-2-415
- USBE Rule R277-622
- School-based Mental Health Qualifying Grant Program Website
- School-based Mental Health Qualifying Grant Program Resources Folder

Key Definitions

- 1. Additional Allocation** (outlined in USBE Rule R277-622-5(8)(9)):
An allocation available to LEAs if there is an excess of funding available after the applications and annual plan updates are approved. It should be considered one-time funding.
- 2. Behavioral Health Support Personnel** (defined in 53F-2-415(1)(a)):
An individual who:
- (i) works under the direct supervision of qualifying personnel to:
 - (A) Support and track a student's progress and access to and completion of school curriculum; and
 - (B) Support students by prompting, redirecting, encouraging, and reinforcing positive behaviors;
 - (ii) is not certified or licensed in mental health; and
 - (iii) meets the professional qualifications as defined by state board rule.
- 3. Qualifying Personnel** (defined in Subsection 53F-2-415(1)):
A school counselor or other counselor, school psychologist or other psychologist, school social worker or other social worker, or school nurse who:
- (a) is licensed; and
 - (b) collaborates with educators and a student's parent on:
 - (i) early identification and intervention of the student's academic and mental health needs; and
 - (ii) removing barriers to learning and developing skills and behaviors critical for the student's academic achievement.
- 4. Related Services:**
Mental-health or school nursing services provided by:
- (a) Qualifying personnel within the scope of their practice; or
 - (b) The local mental health authority; or
 - (c) A private provider through a contract; or
 - (d) Training is funded only through carry forward funds that are provided by qualifying personnel for school personnel.
- 5. Telehealth Services** (defined in Subsection 26B-4-704(1)(h)):
The transmission of health-related services or information through the use of electronic communication or information technology.

LEA Overview

Application Lead Contact Name

David Bullock

Application Lead Contact Position

Director

Application Lead Contact Telephone no.

(801) 731-9859

Application Lead Contact Email Address

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Second Point of Contact Name

Nicole Jones

Second Point of Contact Position

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Business Administrator Name

Josh Broadbent

Business Administrator Position

Business Administrator

Business Administrator Telephone no.

(801) 394-4140

Business Administrator Email Address

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Three-Year Plan Requirements

1. Measurable Goals, Metrics, and Outcomes

Provide a three-year plan for your LEA's measurable goals, metrics, and outcomes approved by your LEA's governing board on improving student engagement, school culture, student safety, and/or academic achievement. (2 goals required)

See the [Goal Writing Guidance Document](#) for tips on writing a S.M.A.R.T. (specific, measurable, attainable, realistic, and timebound) goal.

Your goal must include these three elements:

1: Who is being served (what student population).

2: What is being achieved, which must be measurable.

3: By what time will the goal be achieved.

Example: ABC School district will increase the attendance rates of chronically absent students by 5% by the end of the 2026-2027 school year.

(See Sample Here)

Mental Health Support Goal #1 (category):

Student safety

Goal #1 (spanning three-year grant cycle):

Over the next three years, Quest Academy will implement a comprehensive positive behavior and student support plan designed to foster a safe, supportive, and inclusive learning environment. Through expanded counseling services, staff collaboration, and targeted behavioral interventions, the school will achieve a 25% reduction in documented disruptive behavior incidents by the end of the three-year period, as measured by discipline referrals, classroom behavior reports, and student intervention data.

Baseline data (data collected prior year(s)):

Average of 71 reports of Disruptive Behaviors over the last 3 years.

Projected Target Data for year 1:

65 reports

Projected Target Data for year 2:

59 reports

Projected Target Data for year 3:

53 reports

Identify the type(s) of qualifying personnel and/or contracted services funded through this grant that will support this goal. Select all that apply.

School Counselor

Describe how the qualifying personnel and/or contracted services funded through this grant will support this goal:

The full-time counselor will play a central role in supporting the school's positive behavior and student engagement goals by providing proactive and responsive behavioral, social-emotional, and mental health support services. The counselor will collaborate with teachers, administrators, students, and families to identify students demonstrating behavioral challenges and implement early intervention strategies designed to reduce disruptive behaviors before they escalate.

The counselor will provide individual and small-group counseling focused on conflict resolution, emotional regulation, coping skills, social skills development, and positive decision-making. In partnership with educators, the counselor will help develop and reinforce consistent behavior expectations and restorative practices that promote a safe, inclusive, and supportive learning environment.

Additionally, the counselor will assist with behavior monitoring, intervention planning, and data analysis to track student progress and identify trends related to disciplinary incidents. Through increased availability and consistent student support, the counselor will help remove barriers to learning, improve classroom engagement, and contribute directly to the school's goal of reducing disruptive behavior incidents by 25% over the next three years.

If applicable, describe how the behavioral health support personnel, under the direct supervision of a qualifying personnel, funded through this grant will support this goal (if not applicable, write N/A).

Not Applicable

Mental Health Support Goal #2 (category):

Academic achievement

Goal #2 (spanning three-year grant cycle):

Over the next three years, Quest Academy will implement targeted attendance interventions and student support strategies to improve student engagement and reduce chronic absenteeism. Through expanded counseling services, family outreach, individualized student support plans, and ongoing attendance monitoring, the school will decrease chronic absenteeism student counts by 15% by the end of the three-year period, as measured by annual attendance data and chronic absenteeism reports.

Baseline data (data collected prior year(s)):

Average of 260 students chronically absent over the past 3 years

Projected Target Data for year 1:

247 students chronically absent or reduction of an overall reduction of 5%

Projected Target Data for year 2:

234 students chronically absent or an overall reduction of 10%

Projected Target Data for year 3:

221 students chronically absent or an overall reduction of 15%

Identify the type(s) of qualifying personnel and/or contracted services funded through this grant that will support this goal. Select all that apply.

School Counselor

Describe how the qualifying personnel and/or contracted services funded through this grant will support this goal:

The full-time counselor will support the school's attendance improvement goal by addressing the academic, social-emotional, and personal factors that contribute to chronic absenteeism. The counselor will work collaboratively with students, families, teachers, and administrators to identify barriers to regular attendance and develop individualized intervention strategies that promote consistent school participation.

The counselor will provide ongoing check-ins, individual counseling, mentoring, and goal-setting support for students identified as chronically absent. The counselor will also coordinate family outreach efforts to strengthen communication between home and school, connect families with community resources when needed, and encourage positive attendance habits.

In addition, the counselor will monitor attendance data regularly to identify trends, track student progress, and provide timely interventions before attendance issues escalate. Through increased student support, relationship-building, and proactive intervention strategies, the counselor will help improve student engagement, reduce barriers to attendance, and contribute directly to the school's goal of increasing attendance rates among chronically absent students by 20% over the next three years.

If applicable, describe how the behavioral health support personnel, under the direct supervision of a qualifying personnel, funded through this grant will support this goal (if not applicable, write N/A).

Not Applicable

Mental Health Support Goal #3 (category):

Goal #3 (spanning three-year grant cycle):

Baseline data (data collected prior year(s)):

Projected Target Data for year 1:

Projected Target Data for year 2:

Projected Target Data for year 3:

Identify the type(s) of qualifying personnel and/or contracted services funded through this grant that will support this goal. Select all that apply.

Describe how the qualifying personnel and/or contracted services funded through this grant will support this goal:

If applicable, describe how the behavioral health support personnel, under the direct supervision of a qualifying personnel, funded through this grant will support this goal (if not applicable, write N/A).

2. Implementation Plan

Part A: Write a brief narrative of how the qualifying personnel being hired and/or contracted with will increase students' access to mental health services; including how access is improved for students who are underserved or at risk. (Limit your response to 300 words.)

Quest Academy will increase students' access to mental health services by hiring a full-time licensed counselor to provide comprehensive social-emotional and mental health support for students. The counselor will offer direct services including individual counseling, small-group interventions, crisis response, social-emotional skill development, and referrals to outside community mental health providers when appropriate.

The addition of a full-time counselor will improve timely access to support services by increasing counselor availability throughout the school day and allowing for more consistent and proactive interventions. The counselor will collaborate with teachers, administrators, and families to identify students experiencing academic, behavioral, emotional, or attendance-related challenges and provide early intervention support before concerns escalate.

Expanded counseling services will particularly benefit underserved and at-risk students, including those experiencing chronic absenteeism, behavioral challenges, trauma, anxiety, family instability, or other barriers that negatively impact learning and well-being. The counselor will also conduct family outreach, connect students and families to community resources, and help foster a safe, supportive, and inclusive school environment where all students feel supported and valued. Through increased access to mental health services and targeted interventions, Quest Academy will strengthen student well-being, improve school engagement, and support positive academic outcomes.

Part B: Write a brief narrative to demonstrate a process for utilization of qualifying personnel in your LEA's multi-disciplinary team as outlined in R277-400-8(3) and (4).

Include the following:

- which category of personnel are part of the multi-disciplinary team for identifying students in need of mental health interventions.
- how you are using data to determine:

- mental health interventions,
- progress toward student goals, and
- outcomes of mental health interventions.

(Limit your response to 300 words.)

Quest Academy utilizes a multi-disciplinary team approach to identify students in need of mental health interventions and provide coordinated support services aligned with the requirements outlined in R277-400-8(3) and (4). The school's multi-disciplinary team includes licensed school counselors, administrators, teachers, special education personnel, school support staff, and when appropriate, community mental health partners and parents/guardians. Team members collaborate regularly to review student needs, identify barriers to academic success, and determine appropriate mental health and behavioral interventions.

The team uses multiple sources of data to identify students who may benefit from mental health services and interventions. Data reviewed includes attendance records, discipline referrals, classroom behavior reports, academic performance, teacher observations, social-emotional screening data, counseling referrals, and parent concerns. This data-driven process allows the team to identify students experiencing academic, behavioral, emotional, or social challenges that may interfere with learning and school engagement.

Based on identified student needs, the counselor and multi-disciplinary team develop individualized intervention plans that may include individual counseling, small-group support, behavior interventions, social-emotional skill development, attendance supports, crisis response services, or referrals to community-based mental health providers. Student progress toward goals is monitored regularly through ongoing review of attendance trends, behavioral data, academic performance, counseling participation, and teacher and family feedback.

The team evaluates the outcomes of interventions by analyzing measurable improvements in student attendance, reductions in disruptive behaviors and disciplinary incidents, increased classroom engagement, improved academic performance, and progress toward individualized student goals. Intervention effectiveness is reviewed consistently to ensure supports remain responsive to student needs and to guide adjustments when additional services or strategies are necessary. Through this collaborative and data-informed process, Quest Academy ensures students receive timely,

Part C: Does your LEA intend to collaborate on school-based mental health support with the local mental health authority (LMHA) of the county in which the LEA is located (Location Map)?

No

Does your collaboration include establishing a [contract](#) with the LMHA of the county in which the LEA is located?

No

If you answered "Yes" to either of the first 2 questions of Part C, please provide the information below.

Name of the local mental health authority:

Name for primary point of contact at the local mental health authority:

Email for primary point of contact at the local mental health authority:

List of intended school-based mental health services:

If "Yes" to either of the above, attach a letter of support, in the Attachments section of the Utah Grants Management System, from the local mental health authority of the county in which the LEA is located.

Parent and School Personnel Education & Finances

Parent and School Personnel Education

1. Parent Education - Mental Health, Bullying, and Safety

In accordance with **53G-9-703**, describe how your LEA is meeting the requirements related to parent education.

If your LEA opted out of parent education for mental health, bullying, and safety, please explain why.

(Limit your response to 300 words.)

In accordance with Utah Code §53G-9-703, Quest Academy ensures compliance with parent education requirements by implementing a comprehensive and accessible system of communication, training, and resource sharing designed to support families in promoting student safety, mental health, and overall well-being.

Quest Academy provides parent education resources through multiple platforms to ensure broad accessibility. Key informational materials related to mental health, bullying prevention, substance abuse awareness, internet safety, and crisis resources are posted on the school's website and updated regularly. These online resources allow families to access information at any time and support ongoing learning and awareness at home.

In addition, Quest Academy collaborates with surrounding districts and community partners to promote and participate in regional parent education nights and workshops. These events provide families with opportunities to engage in training sessions led by qualified professionals on topics aligned with state requirements, including mental health awareness, student safety, and prevention strategies.

Parent education is also embedded into existing school events. During back-to-school nights, open houses, and parent-teacher conferences, the school distributes informational handouts and resource guides that highlight key topics such as student mental health supports, behavior expectations, internet safety, and available community services. Staff also take time during these events to explain available school-based supports, including counseling services and referral processes.

Through a combination of online resources, regional collaboration, and in-person informational outreach, Quest Academy meets the intent of §53G-9-703 by ensuring parents have consistent access to meaningful education and resources that support student mental health, safety, and academic success.

2. School Personnel Education - Impact of Childhood Trauma on Student Learning

Provide a description of the timeline and process for training ALL school personnel on the impact of childhood trauma on student learning (R277-622(3)(2)(e)).

(Limit your response to 300 words.)

Quest Academy implements a structured, ongoing training process to ensure all school personnel are educated on the impact of childhood trauma on student learning in alignment with R277-622(3)(2)(e). Training is delivered on a recurring annual cycle with additional targeted professional development as needed throughout the school year.

At the beginning of each school year, all staff—including teachers, administrators, support staff, and related service personnel—participate in required professional development focused on trauma-informed practices. This initial training covers the effects of childhood trauma on brain development, behavior, emotional regulation, attendance, and academic performance, as well as strategies for creating safe, predictable, and supportive learning environments.

Throughout the school year, staff receive ongoing reinforcement through faculty meetings, professional learning communities (PLCs), and targeted training sessions led by the licensed counselor and administrators. These sessions provide practical strategies for responding to trauma-related behaviors, de-escalation techniques, and methods for building positive relationships with students.

Qualified personnel receive trauma-informed training prior to working directly with students, ensuring all staff are prepared to support student needs from the start. In addition, refresher training is provided annually to ensure consistency and continuous improvement in staff understanding and application of trauma-informed practices.

The school counselor plays a key role in supporting staff training by providing guidance, resources, and consultation on individual student needs, as well as assisting staff in implementing trauma-sensitive interventions. This ongoing, multi-tiered training approach ensures that all personnel are equipped to recognize the impact of trauma and respond in ways that promote student safety, engagement, and academic success.

Finances

1. Funding Request

Granted funds can only be used for targeted school-based mental health support, including clinical services and trauma-informed care, through employing (salary and benefits) and/or entering into contracts for services provided by qualifying personnel and/or employing behavioral health support personnel. Grant funds cannot replace previously allocated monies to employ or contract qualifying personnel or behavioral health support personnel. Grant recipients will be awarded an allocation for up to three years of the qualifying grant.

NOTE: The distribution of these funds are awarded in the Utah Grants Management System through reimbursement with the unrestricted indirect cost rate applied.

*Funding for this grant is provided for 3 years. Budgets will change each year based on the fiscal projections for each year.

Part A: Requested Award (Request up to the full amount designated in the Fiscal Projection document. See application overview for projection amount.)

Year 1

\$50,770.09

Year 2*
Year 3*

No entry needed. (Based on fiscal projections)
No entry needed. (Based on fiscal projections)

Part B: Additional Funding

If you are planning to collaborate with the local mental health authority (LMHA) in which your LEA is located, would you be interested in receiving an additional allocation (funds) for the next school year? This is ONLY available for LEAs who collaborate with the LMHA_as indicated in Part C of your Implementation plan.

No

*Notification of an available allocation will be sent following the close of the application cycle. This additional allocation will be available by October 1st and is considered one-time funds.

Assurances

Assurances

1. Each year the LEA will submit the Qualifying Personnel & Contracts Survey, including the required information for all qualifying personnel, contracted services, and behavioral health support personnel for which the LEA is utilizing this grant funding.
2. The LEA will submit the Accountability and Data Report by July 19th.
3. The LEA will comply with 53G-9-203, for training all school personnel on advising educators against practicing medicine, giving a diagnosis, or providing treatment.
4. The LEA will comply with 53E-9-203, to obtain parental consent for all services provided.
5. The LEA will comply with 53F-2-415 and R277-622 to ensure behavioral health support personnel funded with this grant are supervised by a qualifying personnel and receive the required training.

By submitting this application through the Utah Grants Management System, I do hereby certify that all assurances listed above, and all committed resources to this program, will be provided for the implementation of systemic school-based mental health programs for at least three (3) years. Submission of this document signifies that all relevant parties have reviewed and approved this proposal.



QUEST ACADEMY BOARD MEMBER TERMS

Board terms:

1. Steven Reeve (Board Chair)
 - a. 1st Term: 10/17 to 10/20
 - b. 2nd Term: 10/20 to 10/23
 - c. 3rd Term: 10/23 to 06/27
2. Brittney Hale (Vice President)
 - a. 1st Term: 6/17 to 6/21
 - b. 2nd Term: 6/21 to 6/25
 - c. 3rd Term: 6/25 to 6/29
3. Brett Greenwell (Financial Coordinator)
 - a. 1st Term: 10/18 to 10/22
 - b. 2nd Term: 10/22 to 10/26
4. Shawn Miehlike (Board Member)
 - a. 1st Term: 10/20 to 10/24
 - b. 2nd Term: 10/24 to 10/28
5. Nicole Boucher (Board Member)
 - a. 1st Term: 06/24 to 06/28
6. Stacey Phillips (Board Member)
 - a. 1st Term: 08/25 to 08/29

Sex Ed Committee

Required Roles	Assigned Member
Administrator	Dave Bullock
School Health Educator- required for middle or high school	Health Educator
Health Professional	School Nurse
Parents- must have = or greater # of parents than school staff	3 Parents
Optional Roles	Assigned Member
Teacher, Counselor, Board Members	



Teacher and Student Success Plan

School Year: 2026-2027

School: Quest Academy

Date Board Student Success Framework Approved: June 11, 2019

Date Teacher and Student Success Plan Approved: May 21, 2026

General Information – In accordance with the Student Success Framework approved by the Board, Quest has created a Teacher and Student Success Plan designed to improve the school's performance under the state's accountability system (SBE staff have indicated that this means achieving at least a 1% increase from the previous year's overall score). Quest has included two goals in their plan. The Plan must be submitted to the school's Board for approval. The Board will annually review the Plan submitted and use its best efforts to complete the approval process by June 30 each year. The School Land Trust council will select a component of the approved plan to address within the School Land Trust Plan.

Goals based on School Needs

1. With end of year summative assessment, students at Quest in grades 3-8 will increase language arts scores by 1 percentage point as compared to the previous years' proficiency scores.
2. With end of year summative assessment, students at Quest in grades 3-8 will increase math scores by 1 percentage point as compared to the previous years' proficiency scores.

Measurement

1. Goal 1 as measured by end of year summative test.
2. Goal 2 as measured by end of year summative test.

Action Steps

- Teachers will use data to create instructional opportunities for students.
- Students will take end of year summative tests in language arts and math.

Budget

40% of the TSSA funds will be used for teacher salary and benefit increases.

60% of the TSSA funds will be used for salaries to augment existing programs.

The school must post on its website (a) the approved Plan, (b) a description of the school's allocation budgeted and actual expenditures, (c) a summary of how the expenditures help the school accomplish the plan, and (d) the school's current level of performance.

Training Acknowledgment: Open and Public Meetings Act (OPMA)

Compliance for Utah School Board Members

Charter School Name: Quest Academy

Training Academic Year: 2026

I. Purpose and Requirement

In accordance with **Utah Code § 52-4-104**, the presiding officer of a public body (such as a local school board or charter board) is required to ensure that the members of the body are provided with annual training on the requirements of the **Open and Public Meetings Act (OPMA)**.

II. Board Member Attestation

By signing below, I, the undersigned school board member, certify the following:

- **Completion of Training:** I have participated in and completed the annual OPMA training as required by Utah state law.
- **Knowledge of Requirements:** I understand my responsibilities regarding public notice, meeting minutes, recording requirements, and the specific conditions under which a "closed" session may be held.
- **Compliance:** I agree to conduct all public business in an open and transparent manner in compliance with the Act.

III. Documentation Attachment

REQUIRED: Please attach your Certificate of Completion (provided by the Utah State Auditor's Office, USBE, or your district's legal counsel) to this form. This documentation is necessary for local transparency audits and state compliance reviews.

Board Member Name (Printed)	Signature	Date Signed	Certificate Attached (Initial)
			[]

Board Member Name (Printed)	Signature	Date Signed	Certificate Attached (Initial)
			[]
			[]
			[]
			[]
			[]
			[]

IV. Administrative Attestation

I verify that the training was provided and that the certificates for the board members listed above have been received and filed with the official board records.

Superintendent/Director Name: _____

Signature: _____ **Date:** _____

Training Acknowledgment: Review of Local Health Department Data Sexual Education Assurances Compliance

Charter Name: Quest Academy

Date of Review: 5-21-2026

I. Purpose and Authority

In accordance with **Utah Code § 53G-10-402** and **Utah Administrative Code R277-474**, local school boards are required to maintain a "Sexual Education Assurances" document. A key component of these assurances is the review of data every 2 years from the **Local Health Department (LHD)** regarding adolescent health and pregnancy rates to ensure that the curriculum remains relevant and compliant with community needs.

II. Board Member Acknowledgment

By signing below, I, the undersigned school board member, certify the following:

1. **Data Review:** I have personally reviewed the data provided by the Local Health Department concerning local adolescent health indicators, including but not limited to, pregnancy and sexually transmitted infection (STI) rates.
 2. **Curriculum Alignment:** I have considered this data in the context of our current sexual education instructional materials and practices.
 3. **Compliance:** I understand that this review is a required element of the annual Sexual Education Assurances submitted to the Utah State Board of Education (USBE).
-

III. Signatures

Board Member Name (Printed)	Signature	Date

Board Member Name (Printed)	Signature	Date

IV. Administrative Attestation

I verify that the data mentioned above was presented to the Board on the date listed and that this form serves as official documentation of their review.

Director Name: _____

Signature: _____ **Date:** _____

Note for Administrators:

Keep this signed document on file. During a USBE monitoring audit, you may be asked to provide evidence that the board did more than just "approve" the assurances—they must have actually reviewed the specific LHD data that informs them.



QUEST ACADEMY

INNOVATION • PASSION • MASTERY

Board of Directors

2026-2027 Board Meeting Dates

Below are the Board Meeting dates for the 2026-2027 school year. All meetings are tentatively scheduled and are subject to change. There may be additional meetings scheduled throughout the school year. All meetings will be posted on the Utah Public Meeting Notice website. For more official meeting information please visit the [Public Notice Website](#).

Please note that meetings will generally be held at the school in the Q1 Library (4868 W. 4000 S., West Haven) Meetings may also be held electronically or at different locations as specified by the Board of Directors.

Board Meeting Date	Time
August 11, 2026	6:00 pm
October 6, 2026	6:00 pm
December 8, 2026 <i>Electronic Board Meeting</i>	6:00 pm
February 9, 2027	6:00 pm
April 13, 2027 <i>Electronic Board Meeting</i>	6:00 pm
May 25, 2027 <i>Annual Board Meeting</i>	6:00 pm