

Maria Montessori Academy

Board of Directors Meeting

Date: June 11, 2026

Location: 2505 N 200 E North Ogden, UT 84414

Board Members Present: Nancy Lindeman, April Bench, John Horn, Logan Kashanipour, Stephanie Loud, Terri Johnson

Others Present: Kacee Weaver, Hannah Dorius, Jon McQueary, Priscilla Stringfellow



MINUTES

CALL TO ORDER

Nancy Lindeman called the board meeting to order at 4:05PM.

CONSENT ITEMS

- 05.07.2026 Board Meeting Minutes

April Bench made a motion to approve 05.07.2026 Board Meeting Minutes, Stephanie Loud seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

PUBLIC COMMENT

There was no public comment.

Jon McQueary joined the meeting at 4:10PM.

OPEN & PUBLIC MEETINGS ACT TRAINING

Priscilla Stringfellow provided a complete training of the Open & Public Meetings Act to the board. The full presentation was provided to the board in the meeting documentation.

REPORTS

- Director's Report
 - Title IX Report

Director Kacee Weaver presented the Director's Report. Enrollment is sitting at 435 for the 26/27 school year. Staffing and marketing updates were provided to the board. Acadience scores for Reading and Math, and RISE scores for ELA, Math, and Science were reviewed. Reading and Math Data has shown exceptional growth from the previous year. Positive Behavior Plan, Gifted & Talented Report, and Title IX were reported on.

- Finance Report

- Annual Commitment to Ethical Behavior
- Fraud Risk Assessment

Jon McQueary presented the Finance Report to the board. The Fraud Risk Assessment, Annual Commitment to Ethical Behavior, and Ethics Policy were reviewed in detail. The Fraud Risk Assessment is required to be conducted annually and Maria Montessori Academy is considered “very low risk” for fraud.

VOTING AND DISCUSSION ITEMS

- 2025/2026 Amended Budget

Jon McQueary presented the 2025/2026 Amended Budget to the board. Adjustments were made to reflect actual revenues and expenditures for the current school year.

- 2026/2027 Proposed Budget

Jon McQueary presented the 2026/2027 Proposed Budget to the board. Based on around 400 students, the budget is conservative in its projections for the upcoming school year, with each line item derived from historical data and future planning.

Stephanie Loud made a motion to approve the 2025/2026 Amended Budget and 2026/2027 Proposed Budget. April Bench seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

- Audit Engagement Letter (Statement of Work)

Jon McQueary presented the Audit Engagement Letter (Statement of Work). This letter is to engage the audit firm Eide Bailly to conduct the 2025/2026 financial audit. The audit price increased slightly from the previous year.

- 2026/2027 TSSA Plan

Kacee Weaver presented the TSSA Plan for 2026/2027. The plan is similar to previously approved plans. Kacee Weaver explained each of the goals with the associated action steps and budget.

- Schedule A

Kacee Weaver presented the proposed Schedule A changes. The key elements in the Schedule A of the charter school were determined by the school’s director and board chair. A full copy of the Schedule A was provided to the board.

- Award RFP for Speech & Language Therapy

An RFP was conducted for Speech & Language Therapy Services. The School’s Director and several others from the school scored the responses that were received. Something To Talk About received the highest score and it is recommended to the board to approve.

- Mental Health Screening Determination
Priscilla Stringfellow explained the Mental Health Screening Determination to the board. The board discussed the pros and cons of opting into the mental health screener and ultimately decided to table the Mental Health Screening Determination.
- Calcut Consulting Contract
Calcut Consulting has been the provider for psychology services. Kacee Weaver recommended to the board to approve the Calcut Consulting Contract for School Psychologist services including testing, trainings, and counseling services.
- Teton Science Schools Contract
Teton Science School will provide a learning experience for up to 14 participants. This contract includes lodging, meals, and a workshop for all guests. This quote does not include transportation costs.
- AW Special Education Services Agreement
Kacee Weaver presented the need for the AW Special Education Services Agreement to the board. This will support the Special Education audit and review for the upcoming school year.
- Sex Education Committee
Kacee Weaver presented the Sex Education Committee constitution to the board. The board will designate the makeup of the Sex Education Committee as follows: Director, school nurse, health teacher, and 3 parents.
- Policies
 - SHiNE Policy
Kacee Weaver presented the SHiNE Policy to the board. The main amendment refined eligibility terms for the salary supplement, including a provision that teachers whose employment ends before the contract term ends will be paid on a prorated basis. The School determines which educators fall in the “Highly Needed” category for salary supplement.
 - Administration of Medication Policy
Priscilla Stringfellow presented the Administration of Medication Policy amendment to the board. The primary change to the policy reflects new state legislation regarding the storage and administration of glucagon kits at the school. These adjustments bring the policy in line with State law.
- Board Terms & Elected Officers
The board discussed the current board officer positions and the need to confirm and extend member terms. All board member terms and officers are to remain the same.

John Horn made a motion to approve the Audit Engagement Letter, 2026/2027 TSSA Plan, Schedule A, Award RFP for Speech & Language Therapy to Something to Talk About, Calcut Consulting Contract, Teton Science Schools Contract up to \$15,000, AW Services Special Education Contract, Sex Education Committee constitution as discussed, SHiNE Policy amendment, Administration of Medication Policy amendment, and Board Terms & Elected Officers as presently constituted. April Bench seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

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

At 5:55PM, April Bench made a motion to move into closed session to discuss the character, professional competence, or physical or mental health of an individual pursuant to Utah Code 52-4-205(1)(a) at Maria Montessori Academy. Stephanie Loud seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

At 6:06PM, Nancy Lindeman made a motion to move out of closed session. April Bench seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

VOTING AND DISCUSSION ITEMS

- Director Employment Agreement
This item was discussed during closed session.

Stephanie Loud made a motion to approve the Director Employment Agreement. Logan Kashanipour seconded. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, Aye.

CALENDARING

- Next Board Meeting will be held on September 10, 2026 @ 4:00PM.

ADJOURN

At 6:10PM, April Bench made a motion to adjourn. John Horn seconded the motion. The motion passed unanimously. Votes were as follows: Nancy Lindeman, Aye; John Horn, Aye; Logan Kashanipour, Aye; April Bench, Aye; Stephanie Loud, Aye; Terri Johnson, ,,,, Aye.

**Maria Montessori Academy
Board of Directors Closed Session**

Meeting Date: June 11, 2026

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

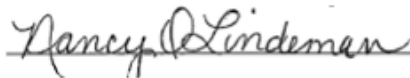


CLOSED SESSION SWORN STATEMENT:

At a duly noticed public meeting held on the date listed above, the board of directors for Maria Montessori Academy entered into a closed session for the sole purpose of discussing the character, professional competence, or physical or mental health of an individual in accordance with Utah Code Ann. 52-4-2(1)(a).

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

Signed on the 11th day of June, 2026, at Maria Montessori Academy, Utah.



Nancy Lindeman, Board Chair

Maria Montessori Academy

Statement of Activities

	Annual June 30, 2026	Year-to-Date June 30, 2026	
	Budget	Actual	% of Budget
Net Income			
Income			
Revenue From Local Sources	203,739	208,206	102.2 %
Revenue From State Sources	5,137,420	5,170,477	100.6 %
Revenue From Federal Sources	104,121	104,121	100.0 %
Other Financing Sources	50,000		0.0 %
Total Income	5,495,280	5,482,804	99.8 %
Expenses			
Instruction/Salaries	2,586,299	2,486,091	96.1 %
Employee Benefits	608,009	559,159	92.0 %
Purchased Prof & Tech Serv	664,193	632,006	95.2 %
Purchased Property Services	269,715	251,307	93.2 %
Other Purchased Services	115,246	114,771	99.6 %
Supplies & Materials	295,484	253,161	85.7 %
Property	108,933	96,801	88.9 %
Debt Services & Miscellaneous	748,500	730,733	97.6 %
Total Expenses	5,396,379	5,124,029	95.0 %
Total Net Income	98,901	358,775	362.8 %

Maria Montessori Academy Board of Directors Meeting

Date: September 10, 2026

Time: 5:00 PM

Location: 2505 N 200 E North Ogden, UT 84414



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

AGENDA

CALL TO ORDER

CONSENT ITEMS

- 06.11.2026 Board Meeting and Closed Session Minutes

PUBLIC COMMENT

REPORTS

- Director's Report
- Finance Report
- New Board Member Consideration

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

VOTING & DISCUSSION ITEMS

- New Board Member Consideration

TRAINING

- School Land Trust Training

VOTING & DISCUSSION ITEMS

- School Land Trust Committee
- TSSA Framework
- Teton Science School Agreement
- LEA Licenses
- Policies
 - Amend Capitalization and Expense Policy
 - Amend Electronic Resources Policy
 - Amend Fee Waiver Policy
 - Amend Financial Reporting Policy
 - Amend Procurement Policy
 - Amend Sex Education Instruction Policy

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

- Review Parent and Family Engagement Policy

CALENDARING

- Next Board Meeting November 12, 2026 @ 4:00pm

ADJOURN



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

Director Report - September 2026

Montessori Moment

The Prepared Environment - Maria Montessori wrote, **"The first aim of the prepared environment is, as far as it is possible, to render the growing child independent of the adult."**

We must ask ourselves, "are the environments and systems we are creating helping children become more capable, independent, responsible, and confident—or are they creating unnecessary barriers?"

The environment is intentionally designed so children can be successful—not because an adult is constantly directing them, but because the space itself supports independence, concentration, choice, and responsibility.

Everything has a purpose. Materials are accessible. There is order and beauty. Children know where things belong and how to care for their community. The environment changes as the needs of the children change.

But the prepared environment is more than shelves and Montessori materials.

We are part of the prepared environment.

The adults, the systems we create, the schedules we build, the resources we provide, and even the decisions we make at this board table all become part of the environment in which children grow.

- **Observe rather than immediately intervene. Prepare yourself, not just the classroom.**
- **Practice humility.**
- **Control your own reactions.**
- **Know when to step back.**
- **Keep preparing throughout life.**

Schoolwide Priorities

1. Strengthen Family and Community Partnerships

Build strong partnerships with families and the broader community by increasing understanding of high fidelity Montessori education through family workshops, open houses, classroom observations, social media, and community outreach.

Clearly communicate what Montessori is—and what it is not—to strengthen parent partnership, increase confidence in our educational model, improve enrollment perception, and create meaningful opportunities for families to actively engage in their child's educational journey.

2. Ensure Every Student Thrives

Continue refining a unified Multi-Tiered System of Supports (MTSS) that integrates academic, behavioral, attendance, and social-emotional supports. Establish consistent Tier 1, Tier 2, and Tier 3 intervention processes, a schoolwide behavior-tracking system, and clear pathways for counseling and student support services to ensure every student receives the right support at the right time.

Provide differentiated instruction through targeted interventions, meaningful hands-on learning experiences, and enrichment and extension opportunities for advanced learners so that every student is appropriately challenged and supported. Use data to monitor student progress, inform instructional decisions, and foster a safe, inclusive, and supportive learning environment.

CSI Goal #1 – Student Achievement

By May 2029, MMA will reduce the achievement gaps for Hispanic students and students with disabilities by at least 5 percentage points in both ELA and mathematics while increasing sixth-grade ELA and mathematics proficiency by 10 percentage points, as measured by the RISE assessment.

School Land Trust Goal –

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

3. Strengthen Curriculum Alignment and Professional Learning

Through collaborative Professional Learning Communities (PLCs), align Montessori curriculum with Utah Core Standards, develop shared Tier 1 instructional resources and pacing guidance, ensure horizontal and vertical alignment, analyze student data, monitor intervention effectiveness, share best practices, and foster collective responsibility for student learning while preserving the integrity of high fidelity Montessori education.

CSI Goal #2 – Systems and Instruction

By the end of the 2028-2029 school year, Maria Montessori Academy will implement consistent Tier 1 instruction and a schoolwide RtI system by achieving 90% fidelity on instructional walkthroughs, providing monthly coaching cycles for all teachers, monitoring intervention progress every two weeks for identified students, and ensuring all PLCs use student data to guide instructional decisions at least twice each month.

4. Invest in Educator Growth and Leadership

Cultivate an exceptional school team by providing ongoing instructional coaching, differentiated professional learning, and meaningful leadership opportunities for every educator.

Expand coaching cycles focused on reflective practice, goal setting, and high-quality Montessori instruction while empowering teachers to lead professional learning, share expertise, attend conferences, and contribute to school improvement initiatives.

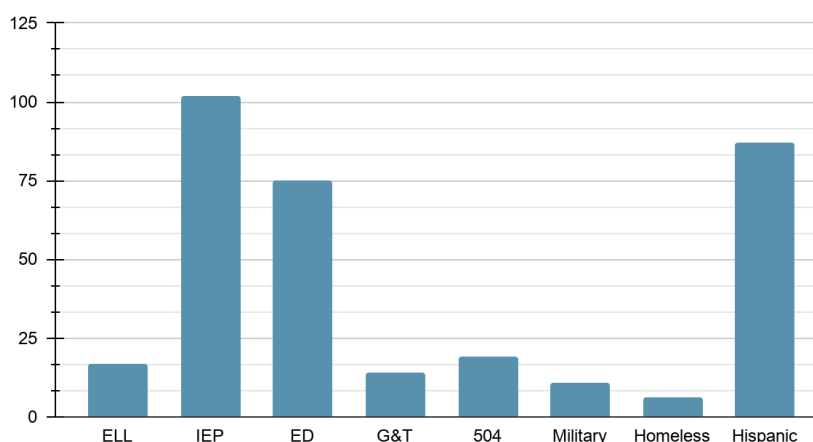
Foster a culture of appreciation by celebrating staff contributions, encouraging peer recognition, and creating traditions that strengthen relationships, belonging, and professional fulfillment.

ENROLLMENT

26-27 Enrollment (As of 9/8/26)

Grade:	K	1	2	3	4	5	6	7	8	9	Total
	71	52	40	56	41	33	41	35	22	12	403

Students in Special Programs



MARKETING

- #1 Charter School in Weber County according to the Standard Examiner!

PROGRAMS

- **School Land Trust Updates -**
 - [School LAND Trust Program Timeline for Governing Board Councils](#)
 - [Administrative Rules](#)
 - [Teacher and Student Success Plan \(TSSP\) Council Involvement](#)
- **Preschool Program** - 24 students enrolled.
- **Academics** - BOY Acadience testing underway. Incredible learning is already happening! The new literacy program for K-3 is going well and students are excited to attend the UFLI lessons.
- **Athletics** - 11 soccer girls athletes. 5 cross country athletes.
- **Theater** - Neverland Project
- **Family Teacher Association** - Busy planning the Fall Festival!
 - Discussed allocating funds toward new playground equipment
- **NSLP** - Preapproval meeting scheduled for Sept 21.
 - Breakfast 8/17 - 9/10 : 1,195
 - Lunch 8/17 - 9/10 : 3,719

- Average meals served per day
 - Breakfast: 74 per day
 - Lunch: 236 per day
- **Safety** - Awaiting arrival of the panic buttons for all classroom teachers. Asked to wait regarding mapping the building and numbering classrooms. Southwest gate to the new city pond has been secured.
- **Grants** -
 - APEX grant : \$15,000 - mobile cooking stations, electrical and exhaust
 - Outdoor classroom grant: \$9000 = Pergola and tables
 - Outdoor recreation grant : \$15,000 = ski lift tickets, ski/snowboard lessons, winter sports rental equipment

FACILITIES

- New compressor for air conditioning in room 6.
- Refrigerator condenser was installed incorrectly will be fixed 9/11/26
- Oven glass shattered potentially due to manufacturing defects. Under warranty.
- Awaiting coat hooks in the kindergarten hallway.

FUNDRAISING

- | | |
|--|--|
| <ul style="list-style-type: none"> ● Microeconomy <ul style="list-style-type: none"> ○ Art Camps ○ Yard Sale ○ Halloween Bash ○ Holiday Market | <ul style="list-style-type: none"> ● FTA <ul style="list-style-type: none"> ○ Spirit Nights ○ Fall Festival ○ Imaginarium |
|--|--|

UPCOMING

- Chick-fil-a Spirit Night - September 14
- Junior High Fall Campout - September 16-18
- Fall Festival - September 25, 4:30-7:30pm
- Yard Sale - October 3
- Parent Teacher Conferences - October 13-14
- International Festival - November 20

EXECUTIVE SUMMARY

DIRECTOR'S REPORT

See board documentation for most up to date report.

Action: *No action needed*

FINANCE REPORT

See board documentation for most up to date report.

Action: *No action needed*

NEW BOARD MEMBER CONSIDERATION

Sabrina Foster is presented to the Board for consideration as a new member of the Maria Montessori Academy Board of Directors. Ms. Foster brings nearly two decades of nonprofit experience in development, grant writing, event coordination, and community partnership, most recently as a consultant with Elevate Consulting and previously as Development and Events Coordinator at the Ogden Nature Center. She has served as a volunteer with the school's Family–Teacher Association since 2024. Her qualifications are presented under Reports, discussed in closed session pursuant to Utah Code 52-4-205(1)(a), and acted upon by the Board in open session.

Action: *Board Vote*

BOARD TRAINING – SCHOOL LAND TRUST

Ongoing board training supports effective governance, informed decision-making, and compliance with statutory requirements. This session addresses the Utah School LAND Trust Program, through which the school receives state School LAND Trust revenue to support improved student academic achievement, and reviews the Board's role in approving, monitoring, and reporting on the School LAND Trust Plan. The training ensures the Board remains aligned with legal standards and well-equipped to serve the school community.

Action: *No Action Needed*

AMEND THE TSSA FRAMEWORK

The TSSA framework is required to be updated to include a Literacy Achievement in accordance with SB 241 (2026) and State Rule R277-927. The Plan has been updated to address the school's progress toward statewide literacy proficiency goals and if the school fails to meet statewide literacy goals, the school must dedicate at least 50% of TSSA funds toward evidence-based literacy interventions and practices as described in 53G-7-921304(2)(e).

Action: Board Vote

TETON SCIENCE SCHOOLS AGREEMENT

Teton Science Schools will provide a multi-day, field-based science learning experience for Maria Montessori Academy students at the Kelly Campus in Kelly, Wyoming, from April 12–16, 2027. The agreement includes lodging, meals, integrated science curriculum and instruction, transportation to program areas, and equipment for the duration of the program; it does not include transportation to and from the campus. The contract establishes a minimum of 20 and a maximum of 25 students at a per-student rate of \$707.36, with a deposit of \$7,073.60 due November 1, 2026, and the balance due one month following the conclusion of the program. Board approval is requested to authorize the agreement in an amount not to exceed \$18,000 and to authorize the Board Chair or designee to execute the agreement on behalf of the school.

Action: Board Vote, authorize board chair to sign

LEA SPECIFIC LICENSES

The Board is asked to approve LEA-Specific educator licenses, license areas, and endorsements for seven (7) individuals. The license areas, and endorsements shall be valid for three (3) academic years as indicated on the attached spreadsheet which contains the associated educator information and rationale for the request. All LEA-Specific licenses will expire on June 30th of the final academic year approved. The Maria Montessori Academy Board of Directors additionally acknowledges that LEA-Specific educator licenses, license areas, or endorsements may be renewed by the Utah State Board of Education (USBE). These renewals will be approved or denied on a case-by-case basis.

Action: Board Vote

AMEND CAPITALIZATION AND EXPENSE POLICY

Federal regulations (2 CFR § 200.313) and the Utah Division of Finance's Capital Assets Policy 9-1 were amended to increase the capitalization threshold from \$5,000 to \$10,000. The school's Capitalization and Expense Policy has been revised accordingly. The school's accountant supports this policy change.

Action: Board Vote

AMEND ELECTRONIC RESOURCES POLICY

This policy and the corresponding administrative procedures have been revised to comply with the changes to law, including those in SB 88 from the 2026 legislative session. The changes include specifying that the policy must be

reviewed and approved at least every three years, that all rules and procedures applicable to the policy must be available for review at the school, that AI glasses are now included in the definition of “electronic device,” and that parents may request administration to allow their student to briefly use a privately-owned electronic device during non-instructional time at a specified location designated by the school. The changes also include clarifying the definition of “obscene” and “harmful to minors” and explaining that the school’s technology protection measures include a parent-accessible monitoring system that allows parents to review the activity of their children on school-owned electronic devices.

Action: Board Vote

AMEND FEE WAIVER POLICY

HB 142 permits students to receive fee waivers for no more than two (2) school-sponsored trips per school year. To qualify for a fee waiver for a second school-sponsored trip during the same school year, a student must request the waiver and, in coordination with school administration, complete an action plan describing how the student or the student’s family will contribute to the school or the community through work or other service in lieu of paying the trip fees. The school’s Fee Waiver Policy has been revised to reflect these statutory changes.

Action: Board Vote

AMEND FINANCIAL REPORTING POLICY

Audits of the school’s financial reporting must now be conducted in accordance with both Generally Accepted Auditing Standards (GAAS) and Generally Accepted Government Auditing Standards (GAGAS). Because the school’s Financial Reporting Policy currently references only GAAS, it has been revised to also require compliance with GAGAS.

Action: Board Vote

AMEND PROCUREMENT POLICY

The school’s Procurement Policy has been revised to comply with changes to R33-105, including with respect to quotes for purchases between \$5,000 and \$50,000, professional services, and construction projects. A provision was also added regarding the school following federal procurement requirements, if applicable, when using federal grant funds to procure goods and services.

Action: Board Vote

AMEND SEX EDUCATION INSTRUCTION POLICY

HB 281 from the 2025 legislative session revised the definition of “sex education instruction.” It also modified the list of sex education related topics that are not allowed to be taught in school (e.g., adding abortion or abortive methods to the list of prohibited topics). In addition, HB 281 revised health curriculum requirements for junior high and high school students (e.g., requiring instruction in “situational awareness” and the “success sequence”). The school’s Sex Education Instruction Policy and administrative procedures have been revised to comply with the updated definitions and requirements from HB 281. Other proposed revisions to the policy and procedure have also been made, including specifying that parent or staff complaints about the school’s sex education instruction materials should be addressed in accordance with the school’s applicable grievance policy. Although HB 281 was passed in 2025, the changes relative to sex education instruction go into effect beginning July 1, 2026.

Action: Board Vote

REVIEW PARENT AND FAMILY ENGAGEMENT POLICY

Under Utah governance requirements, certain Board policies must be reviewed periodically. The Parent and Family Engagement Policy is currently due for scheduled review. At this time, no revisions are recommended, and no Board action or vote is required.

Action: Review; No Action Needed

Maria Montessori Academy
Policy: Electronic Resources Policy
Adopted: February 11, 2014
Renewed: June 28, 2022
Renewed: May 9, 2023
Renewed: September 11, 2025



Purpose

Maria Montessori Academy (the “School”) recognizes the value of computer and other electronic resources to facilitate student learning and help the School’s employees accomplish the School’s mission. The School has therefore made substantial investments to establish a network and provide various electronic resources for its students’ and employees’ use. Because of the potential harm to students and the School from misuse of these resources, the School requires the safe and responsible use of computers; computer networks, including e-mail and the Internet; and other electronic resources. This policy is intended to ensure such safe and responsible use and to comply with Utah Administrative Rule R277-495, Utah Code § 53G-7-227, Utah Code § 53G-7-1001 *et seq.*, the Children’s Internet Protection Act, and other applicable laws.

Policy

Electronic Devices

The School recognizes that various forms of electronic devices are widely used by both students and employees and are important tools in today’s society. The School seeks to ensure that the use of electronic devices, both privately-owned devices and devices owned by the School, does not cause harm or otherwise interfere with the learning, safety, or security of students or employees.

Definitions

“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 cellphone or smartphone, a smart or electronic watch, a tablet, a virtual reality device, or AI glasses.

“Privately-owned electronic device” means an electronic device that is not owned or issued by the School to a student or employee, including any emerging technology (which includes any device that has or will be able to act in place of or as an extension of an individual’s cellphone).

“School-owned electronic device” means an electronic device that is owned, provided, issued, or lent by the School to a student or employee.

“School hours” means the time from the beginning of the School day, as designated by the School’s bell schedule, until the end of the School day, as designed by the School’s bell schedule, including all instructional time, lunch periods, recess, and transition times between classes.

“School-sponsored activities” means field trips, curricular and extracurricular activities, and extended School-sponsored trips or activities, including School-provided transportation to and from such activities.

Student Use of Electronic Devices

Electronic devices may only be possessed and used by students during School hours and during School-sponsored activities in accordance with the following standards:

- Electronic devices may not be used to view, access, download, store, or transmit pornography or other obscene or inappropriate material.
- Electronic devices may not be used to bully, threaten, embarrass, harass, or intimidate other students, teachers, volunteers, School guests, or School employees.
- Electronic devices may not be used in ways that violate local, state, or federal laws.
- Electronic devices may not be used during quizzes, tests, and standardized assessments except as otherwise provided herein.
- Electronic toys are not allowed in the School.
- Students may have privately-owned electronic devices in their possession during School hours or at School-sponsored activities. However, privately-owned electronic devices must remain out of sight in a bag, backpack, or locker and be turned off or set to a mode where notifications can’t be received, unless an exception provided herein applies.
- Students may not use or respond to privately-owned electronic devices during School hours, unless an exception provided herein applies.

Exceptions

The Principal may give permission for a student to possess and use a privately-owned electronic device during School hours and during School-sponsored activities for good cause if the device does not distract from the instructional or educational process and is not otherwise used inappropriately.

Parents may request that the Principal allow a student to possess and use a privately-owned electronic device on active mode at all times during School hours and during School-sponsored activities, with the exception of during tests and standardized assessments, for good cause, including medical needs or unusual family situations. Parents may also request that the Principal allow a student to briefly use a privately-owned electronic device during non-instructional time in a specified location designated by the School.

Students may use a privately-owned electronic device to address a medical necessity.

A student may possess and use a privately-owned electronic device on active mode at all times during School hours and during School-sponsored activities, including during assessments, if such an accommodation is specified in a written Section 504 plan, an Individualized Education Plan, or in connection with other legitimate circumstances determined by the Principal.

Privately-owned electronic devices may be possessed and used in the event of an emergency during the limited period of the emergency in order to protect the safety of a student or School employee, visitor or volunteer. This includes using a privately-owned electronic device to respond to an imminent threat to health or safety of an individual or to respond to a School-wide emergency.

Students may also use a privately-owned electronic device during School hours and during School-sponsored activities to use the SafeUT Crisis Line.

Parents may make other individualized requests for exceptions to this policy to the Principal.

Consequences for Violation

A student will receive one warning prior to discipline for violating this policy unless the violation involves cheating or constitutes a violation of the School's Student Conduct and Discipline Policy or Bullying and Hazing Policy or at the discretion of the Principal. On the second violation of this policy, if the violation involves a privately-owned electronic device, the privately-owned electronic device will be confiscated, labeled, and held in a secure location. The Principal, teachers, and other individuals designated by the Principal may confiscate privately-owned electronic devices under this policy.

Despite the foregoing, a privately-owned electronic device may be confiscated after an initial or other violation of this policy if the violation is deemed serious by the Principal, teacher, or another individual designated by the Principal. Serious violations include but are not limited to a student using a privately-owned electronic device to:

- Threaten, harass, bully, or intimidate another person;
- Access pornography or obscene material;
- Engage in academic dishonesty;
- Participate in criminal behavior; or
- Repeatedly or egregiously disrupt classroom or other School instruction.

An individual other than a student that finds or confiscates a privately-owned electronic device may search the device for the purpose of determining the device's owner. Students may not search privately-owned electronic devices that do not belong to them. Privately-owned electronic devices that are used inappropriately may be subject to search by the Principal or other individuals designated by the Principal if there is a reasonable suspicion that the device contains obscene or pornographic material or has

been used to cheat or to threaten, embarrass, harass, or intimidate other students, teachers, volunteers, School guests, or School employees. School-owned electronic devices may be searched at any time by School officials, with or without cause.

The School is not responsible for loss, damage or theft of any privately-owned electronic devices. The School will make reasonable efforts to notify parents/guardians if the School has confiscated a student's privately-owned electronic device. Parents/guardians who show identification may retrieve confiscated electronic devices during School hours or by appointment. The School will retain un-retrieved privately-owned electronic devices until the end of the School year, at which time the devices will be disposed of in a manner that ensures that no data stored on the device may be retrieved.

The Principal may, subject to applicable law, impose additional disciplinary consequences for a student's violation of this policy, considering the nature of the violation and other disciplinary actions in which the student has been involved. Such disciplinary actions may include:

- Loss of the privilege to possess or use electronic devices
- Disciplinary letter to the student's parent/guardian that is placed in the student's file
- Detention
- In-School suspension
- Suspension
- Expulsion
- Loss of the privilege of participating in School-sponsored activities or of receiving honor recognition

The School may contact law enforcement if School employees believe that a student has used an electronic device in connection with a violation of criminal law, and criminal penalties may arise from inappropriate use of electronic devices.

Notice of the Policy

The School will give parents and students written notice of this policy annually. Written notice will be satisfied by posting the policy on the School's website in the same location as the School's Data Governance Plan required in R277-487. The School may also provide notice by publishing the policy in a School handbook, sending the policy to the student's home, or any other reasonable means.

Creative and Innovative Uses for Electronic Devices

Teachers and other School employees are encouraged to use electronic devices creatively in order to effectively communicate with students and parents/guardians and to enhance instruction. Creative uses might include notifying absent students of assignments, communicating with parents when students excel or if they are behind or absent, notifying students and parents of news articles or events that would enhance

the learning experience, providing feedback to students on tests and assignments, parents notifying the School when students are absent or tardy.

Other Provisions

Picture taking or sound or video recording by students is prohibited in School unless authorized by a teacher or the Principal. Picture taking or sound or video recording by students is prohibited in private areas of the School such as locker rooms, counseling sessions, washrooms, and dressing areas. Violations of this may subject students to discipline, and any suspected illegal activity may be reported to law enforcement.

Students bring privately-owned electronic devices on School property at their own risk. The School is not responsible for lost, stolen or damaged privately-owned electronic devices.

Students are responsible for their privately-owned electronic devices and may be subject to discipline if their device is misused by another.

Parents, guests and visitors to the School may use electronic devices at School and at School-sponsored activities only in accordance with rules established by the Principal. Such individuals who use the School's electronic resources may not use such resources to access inappropriate material or information.

Internet Safety

It is the School's policy to: (a) prevent user access over its computer network to, or transmission of, inappropriate material via Internet, electronic mail, or other forms of direct electronic communications; (b) prevent unauthorized access and other unlawful online activity; (c) prevent unauthorized online disclosure, use, or dissemination of personal identification information of minors; and (d) comply with the Children's Internet Protection Act (section 254(h) of title 47, United States Code).

Definitions

Key terms are as defined in the Children's Internet Protection Act.

"Technology Protection Measure" means a specific technology that blocks or filters Internet access to visual depictions that are:

- 1- Obscene, which means material that is obscene under section 1460 of title 18, United States Code, and applicable United States Supreme Court precedent.
- 2- Child Pornography, as that term is defined in section 2256 of title 18, United States Code; or
- 3- Harmful to minors.

“Harmful to Minors” means, as set forth in section 254 of title 47, United States Code, any picture, image, graphic image file, or other visual depiction that:

- 1- Taken as a whole and with respect to minors, appeals to a prurient interest in nudity, sex, or excretion;
- 2- Depicts, describes, or represents, in a patently offensive way with respect to what is suitable for minors, an actual or simulated sexual act or sexual contact, actual or simulated normal or perverted sexual acts, or a lewd exhibition of the genitals; and
- 3- Taken as a whole, lacks serious literary, artistic, political, or scientific value as to minors.

“Sexual Act” and **“Sexual Contact”** have the meanings given such terms in section 2246 of title 18, United States Code.

Access to Inappropriate Material

The School employs technology protection measures (or “Internet filters”) to block or filter Internet access to—or other forms of electronic communications containing—inappropriate information over the School’s network or by School-owned electronic devices. These technology protection measures constitute the School’s preapproved content filtering system as described in Utah Code § 53G-7-1003, and they are employed by the School regardless of whether a parent requests them or not. The School also employs a parent-accessible monitoring system, which is a technology platform that enables a parent to review the activity of the parent’s student on School-owned electronic devices.

Specifically, as required by the Children’s Internet Protection Act, blocking shall be applied to visual depictions of material deemed obscene or child pornography, or to any material deemed harmful to minors.

Subject to staff supervision, technology protection measures may be disabled or, in the case of minors, minimized only for bona fide research or other lawful purposes. Procedures for disabling or otherwise modifying any technology protection measures shall be the responsibility of the Principal or designated representatives.

Inappropriate Network Usage

To the extent practical, steps shall be taken to promote the safety and security of users of the School online computer network when using electronic mail, chat rooms, instant messaging, and other forms of direct electronic communications.

Specifically, as required by the Children’s Internet Protection Act, prevention of inappropriate network usage includes: (a) unauthorized access, including so-called “hacking” and other unlawful activities and (b) unauthorized disclosure, use, and dissemination of personal identification information regarding minors.

Education, Supervision and Monitoring

It shall be the responsibility of all School employees to educate, supervise and monitor appropriate usage of the School's online computer network and access to the Internet in accordance with this policy, the Children's Internet Protection Act, the Neighborhood Children's Internet Protection Act, and the Protecting Children in the 21st Century Act. This includes educating students about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms, as well as cyberbullying awareness and response. The School will also provide information regarding these matters to parents/guardians.

Student Acceptable Use of School Electronic Resources

The School makes various electronic resources available to students. These resources include computers and other electronic devices and related software and hardware as well as the School's network and access to the Internet. The School's goal in providing such electronic resources to students is to enhance the educational experience and promote the accomplishment of the School's mission.

Electronic resources can provide access to a multitude of information and allow communication with people all over the world. Along with this access comes the availability of materials that may be considered inappropriate, unacceptable, of no educational value, or even illegal. The School has initiated safeguards to restrict access to inappropriate materials, and use of the Internet and other electronic resources is monitored as well.

In order to use the School's electronic resources, students must be willing to abide by the rules of acceptable use. Use of the School's electronic resources is a privilege, and students have no expectation of privacy in connection with their use of the School's electronic resources. Students who abuse this privilege by actions such as damaging the School's electronic resources; violating copyrights; bullying, hazing, intimidation, harassment and threats; accessing pornography or other obscene or inappropriate material; inappropriate language; gambling; unauthorized games; or other unauthorized or inappropriate use, will be subject to discipline. Violation of policies and rules regarding use of the School's electronic resources may also result in confiscation of School-issued devices and denial of access to the School's electronic resources. This may result in missed assignments, inability to participate in required assignments and assessments, and possible loss of credit or academic grade consequences.

The School may contact law enforcement if School employees believe that a student has used School electronic resources in connection with a violation of criminal law, and criminal penalties may arise from inappropriate use of electronic resources. This applies to use of the School's electronic resources at any time and place, whether on or off School grounds.

Students are personally responsible for School electronic resources provided to them and the students and their parents/guardians may be held responsible for loss or damage to such electronic resources.

Parents play an important role in helping students understand what does and does not constitute acceptable use.

The Principal shall ensure that additional rules and procedures regarding students' use of the School's electronic resources are established and clearly communicated to students and their parents/guardians. The Principal shall ensure that students receive appropriate training regarding these rules and procedures. The rules and procedures shall be available for review at the School.

Staff Acceptable Use of School Electronic Resources

Improper use of the School's electronic resources by employees has the potential to negatively impact students, damage the School's image, and impair the School's electronic resources. Therefore, this policy is intended to govern employees' and volunteers' use of the School's electronic resources, and employees must agree to these terms as a condition of employment.

At-Will Employment

Nothing in this policy is intended to create additional rights for any employee or to otherwise alter or amend the at-will nature of the employment relationship between the School and any employee.

The School's Rights

It is the School's policy to maintain an environment that promotes safe, ethical and responsible conduct in all activities involve the use of the School's electronic resources. The School recognizes its legal and moral obligation to protect the well-being of students and to preserve the integrity of its electronic resources. The School's rights in connection with its electronic resources include but are not limited to the following:

1. All data, files, programs, and materials downloaded with or used, sent, received, or stored upon the School's electronic resources are the School's property, and the School may deal with such items as it deems appropriate.
2. The School may log network use and monitor server space utilization by users and assumes no responsibility or liability for files deleted due to violation of server space allotments.
3. The School may remove a user account on the network with or without notice.
4. The School may monitor all user activities on the School's electronic resources, including but not limited to real-time monitoring of network activity and/or maintaining a log of Internet activity for later review.

5. The School may provide internal and external controls of network usage as appropriate and feasible, including but not limited to restricting online destinations through software or other means.
6. The School may limit or restrict, with or without notice, access to the School's electronic resources for those who do not abide by this policy or other direction governing the use of the School's electronic resources.
7. The School may determine, in its sole discretion, what materials, files, information, software, communications, and other content or activity are permitted or prohibited.
8. The School may delete or remove, with or without notice, any files, programs, data or other materials from any of the School's electronic resources.
9. The School may provide additional policies or guidelines regarding acceptable use of electronic resources.

Employees' Responsibilities Regarding Students' Use of Electronic Resources

Employees who supervise students, control electronic resources, or otherwise have the ability to observe student use of School electronic resources are responsible for educating students on appropriate use of the School's electronic resources. Such employees shall make reasonable efforts to monitor such use to ensure that it is consistent with applicable rules. Employees should make reasonable efforts to become familiar with the Internet and the use of the School's electronic resources to help ensure effective monitoring, instruction, and assistance.

User Responsibilities

Use of the School's electronic resources is a privilege intended to help employees fulfill their responsibilities and promote the School's mission. In order to maintain this privilege, users must agree to comply with this policy. Users who are aware of any violation of this policy by any employee must report the violation to the Principal. Employees are responsible for any School electronic resources issued to them at all times and may be held responsible for any inappropriate use, regardless of the user.

Employees may use privately-owned electronic devices at School or at School-sponsored activities in accordance with rules and procedures established by the Principal.

Violation of this policy is grounds for discipline, up to and including termination. The School may also notify law enforcement as appropriate, and such actions may subject an employee to criminal penalties.

Acceptable Use

Standards for acceptable use of the School's electronic resources include but are not limited to the following:

1. All use of the School's electronic resources, including but not limited to use of computers and other electronic devices, use of e-mail, and network and Internet access must be consistent with the School's mission.
2. Network accounts are to be used only by the authorized user of the account for the authorized purpose.
3. Users must take reasonable steps to protect the privacy of students, School employees and other members of the School community and must strictly maintain the confidentiality of information regarding such individuals.
4. Use of the School's electronic resources, whether inside or outside the School, must comply with the School's employee handbook, as established from time to time.
5. Employees must comply with applicable copyright laws, ethical rules, and other applicable laws and regulations.
6. Users must exercise appropriate professional judgment and common sense when transporting files to and from school, keeping in mind copyright and other legal issues, as well as ensuring that the non-School to or from which files are being transferred are employing appropriate virus-control technologies.
7. Users must exhibit professionally appropriate behavior when using the School's electronic resources in order to professionally represent and preserve the image the School.
8. Users must take reasonable precautions to protect the School's electronic resources in order to reduce repair costs, maintain the integrity of the network, and protect the School's assets. Employees who damage School electronic resources may be financially responsible for the cost of repair or replacement.
9. From time to time, the School will make determinations on whether specific uses of the School's electronic resources are consistent with the intent of this policy.

Unacceptable Use

The following uses of the School's electronic resources are prohibited:

1. Excessive use of the School's electronic resources for personal matters.
"Excessive use" includes but is not limited to use of electronic resources in a manner that interferes with an employee's performance of work-related responsibilities or with the functioning of the School's electronic resources.
2. Use of the School's electronic resources in connection with social networking sites for non-academic purposes is prohibited.
3. Use of the School's electronic resources for commercial or for-profit purposes.
4. Use of the School's electronic resources for product advertisement or political lobbying.
5. Personal electronic devices may only be connected to the School's network with appropriate authorization.
6. Intentionally seeking information on, obtaining copies of, or modifying files, other data, or passwords belonging to other users, or impersonating or misrepresenting other users of the School's network.

7. Unauthorized use or disclosure of personal student information in violation of the Family Educational Rights and Privacy Act, 34 CFR, Part 99.
8. Use of the School's electronic resources in a manner that disrupts the use of the network by others.
9. Destroying, modifying, or abusing the School's electronic resources in any way.
10. Use of the School's electronic resources in a manner that threatens or impairs the integrity or security of the network.
11. Use of the School's electronic resources for hate mail, chain letters, harassment, discriminatory remarks, and other antisocial behaviors.
12. Downloading or installation of any software, including shareware and freeware, for use on the School's electronic resources without the approval of the Principal or designee.
13. Use of any software on the School's electronic resources in violation of the applicable license or use agreement.
14. Use of the School's electronic resources to access, process, store, send or receive pornographic, sexually explicit or otherwise inappropriate material (as determined by the Principal).
15. Use of the School's electronic resources for downloading entertainment software, files or other material not related to the mission of the School. This prohibition pertains to freeware, shareware, copyrighted commercial and non-commercial software, and all other forms of software and files not directly related to the instructional and administrative purposes of the School.
16. Downloading, copying, otherwise duplicating, and/or distributing copyrighted materials without the specific written permission of the copyright owner, except that duplication and/or distribution of materials for educational purposes is permitted when such duplication and/or distribution would fall within the Fair Use Doctrine of federal copyright law.
17. Use of the School's electronic resources for any unlawful purpose.
18. Use of the School's electronic resources to intentionally access, process, store, send or receive materials containing profanity, obscenity, racist terms, or other harassing, abusive, intimidating, threatening, discriminatory or otherwise offensive language or images.
19. Use of the School's electronic resources for playing games unless it is for instructional purposes or otherwise approved by the Principal or designee.
20. Participating in activities, including but not limited to the preparation or dissemination of content, which could damage the School's professional image, reputation and/or financial stability.
21. Permitting or granting access to the School's electronic resources, including but not limited to granting use of an e-mail or network account or password, to another individual, including but not limited to someone whose access has been denied or terminated.
22. Portable data storage devices may only be used to backup or transport files and data between computers and use of such devices for the operation of unauthorized portable applications is prohibited.
23. Establishing connections to live communications, including text, voice, or video, may only be done in a manner approved by the Principal or designee.

24. Malicious use of the School's electronic resources to develop programs that harass other users or infiltrate a computer or computing system and/or damage the software components of a computer or computing system.

Disclaimer

1. The School cannot be held responsible for information that is retrieved via the network.
2. Pursuant to the Electronic Communications Privacy Act of 1986 (18 U.S.C. § 2510, et seq.), notice is hereby given that there are no facilities provided by the School's system for sending or receiving private or confidential electronic communications. System administrators have access to all mail and will monitor messages. Messages relating to or in support of illegal activities will be reported to the appropriate authorities.
3. The School is not responsible for any damage users may suffer, including loss of data resulting from delays, non-deliveries, or service interruptions caused by the School's negligence or your errors or omissions.
4. Use of any information obtained is at the user's own risk.
5. The School makes no warranties (expressed or implied) with respect to:
 - The content of any advice or information received by a user, or any costs or charges incurred as a result of seeing or accepting any information;
 - Any costs, liability, or damages caused by the way the user chooses to use his or her access to the network.
6. The School reserves the right to change its policies and rules at any time.

Privacy

Use of and access to the School's electronic resources is provided to employees as a tool for the School's business. The School reserves the right to monitor, inspect, copy, review, store or remove, at any time, without prior notice, any and all usage of the School's electronic resources such as the network and the Internet, including but not limited to e-mail, as well as any and all materials, files, information, software, electronic communications, and other content transmitted, received or stored in connection with this usage. All such information, content, and files are the property of the School. Employees should have no expectation of privacy regarding them. Network administrators may review files and intercept communications for any reason, including but not limited to maintaining system integrity and ensuring employees are using the system consistently with this policy.

This policy will be reviewed periodically to ensure that it continues to meet the School's needs.

Training

The School will provide, within the first 45 days of each school year, a School-wide or in-classroom training to employees and students that covers:

- The contents of this policy;
- The importance of digital citizenship;
- The School's conduct and discipline related consequences as related to a violation of this policy;
- The School's general conduct and discipline policies;
- The benefits of connecting to the Internet and utilizing the School's Internet filters while on School property; and
- Any specific rules governing the permissible and restricted uses of privately-owned electronic devices while in a classroom.

Each educator who allows the use of a privately-owned electronic device in the classroom must clearly communicate to parents and students the conditions under which the use of such a device is allowed.

The School will provide an annual notice to all parents of the location of information for in-home network filtering options (<https://consumerprotection.utah.gov/edu/filtering.html>) as provided for in Utah Code § 76-5c-402.

Complaints

Complaints about this policy or its enforcement, or complaints about observed behavior regarding the policy, should be addressed in accordance with the School's grievance policies.

Review and Approval

This policy will be reviewed and approved at least every three years to ensure that it continues to meet the School's needs.

**Staff Acceptable Use of School Electronic Resources
Acknowledgement of Receipt and Understanding**

I hereby certify that I have read and fully understand the contents of the School's policies regarding use of the School's electronic resources. Furthermore, I have been given the opportunity to discuss any information contained therein or any concerns that I may have. I understand that my employment and continued employment is based in part upon my willingness to abide by and the School's policies, rules, regulations and procedures. I acknowledge that the School reserves the right to modify or amend its policies at any time, without prior notice. I acknowledge that these policies do not create any promises or contractual obligations between the School and its employees and that my employment with the School continues to be at will. My signature below certifies my knowledge, acceptance and adherence to the School's policies, rules, regulations and procedures regarding the use of its electronic resources. I acknowledge that violation of any of these policies may be grounds for discipline, up to and including termination.

Employee Signature

Employee Name

Date



Policy

Maria Montessori Academy (the “School”) will follow applicable state and federal laws in connection with the procurement of services, supplies and equipment, including but not limited to the provisions of the Utah Procurement Code at Utah Code § 63G-6a-101, *et seq.* and the administrative rules in Title R33 of the Utah Administrative Code.

Procurement Processes

The School will follow the procurement processes below unless an exception applies.

Quotes or Bids Not Required

No procurement process is required for purchases of items up to \$5,000. The School may make such purchases from any vendor without obtaining competitive bids or quotes. However, the School may only purchase up to \$10,000 worth of items each costing \$5,000 or less from one vendor at one time without obtaining competitive bids or quotes. The School may also only purchase up to \$50,000 worth of items each costing \$5,000 or less from one vendor during one year without obtaining competitive bids or quotes.

Quotes or Bids Required

For small purchases as defined in R33-105, which will typically include purchases of items between \$5,000.01 and \$50,000 other than professional services or construction projects, the School will determine minimum specifications, provide the specifications to multiple vendors, obtain at least two competitive bids or quotes that include minimum specifications and purchase from the responsible vendor offering the lowest bid or quote meeting the specifications. The School will also record and maintain as a governmental record the names of the vendors offering bids or quotes and the date and amount of each bid or quote.

Formal Procurement Process Necessary

For purchases of items over \$50,000 other than professional services or construction projects, the School will conduct a formal procurement process, such as an Invitation for Bids or a Request for Proposals.

Professional Services

For small purchases of professional service providers and consultants as defined in R33-105, which will typically include purchases of such services up to \$100,000 per project, the School will first review the qualifications of at least three companies, firms, providers, and/or individuals; rank them from highest to lowest; begin direct negotiation with the highest ranked; and if an agreement cannot be reached with the highest ranked, move to the next highest until an agreement is reached. Obtaining competitive bids or quotes for the above-described small purchases is not required.

For small purchases of design professional services as defined in R33-105, which will typically include purchases of such services up to \$100,000 per project, the School will first review the qualifications of at least three design professional firms and then select one through direct negotiation. The School will also include minimum specifications when doing a small purchase of design professional services as defined in R33-105. Obtaining competitive bids or quotes for the above-described small purchases is not required.

However, if the cost of a professional service provider's, consultant's, or design professional's services exceeds \$100,000, the School will conduct a formal procurement process for such services, such as an Invitation for Bids or a Request for Proposals.

Construction Projects

For small purchases of construction projects as defined in R33-105, the School may procure a small construction project up to \$25,000 from a contractor without obtaining competitive bids or quotes after documenting that all building code approvals, licensing requirements, permitting, and other construction related requirements are met. When procuring a small construction project costing between \$25,000.01 and \$100,000, the School will obtain at least two competitive bids or quotes that include minimum specifications and will award the project to the contractor with the lowest bid or quote that meets the specifications after documenting that all applicable building code approvals, licensing requirements, permitting, and other construction related requirements are met.

The School will include minimum specifications when doing a small purchase of a construction project as defined in R33-105. Contractors selected by the School to do a small construction project must certify that they are capable of meeting the minimum specifications of the project.

If the cost of a construction project exceeds \$100,000, the School will conduct a formal procurement process, such as an Invitation for Bids or a Request for Proposals.

Other Requirements

The School will not artificially divide purchases or otherwise take steps in order to avoid the requirement to obtain competitive bids or quotes or conduct a formal procurement process.

School personnel will comply with the provisions of the Procurement Code prohibiting the acceptance of gratuities or kickbacks from vendors during the procurement process. The School's contracts with vendors, including any renewal or extension periods, will not have a term that is longer than five years unless an exception applies or the School complies with the requirements of the Procurement Code governing any contract with a term that is longer than five years.

The School will comply with the requirements of the Procurement Code in connection with any construction or real property improvements undertaken by the School.

When entering into a contract, the School will ensure that the contract includes appropriate language regarding the scope of work to be performed, adequately addresses any applicable federal requirements, and includes language regarding data privacy and use, where appropriate. The School will ensure that the appropriate legal review of contract language is performed prior to entering into the contract.

When the School uses federal grant funds to procure goods or services, the School will comply with applicable federal law and regulations, including the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, 2 C.F.R. Part 200. To the extent federal procurement requirements are more restrictive than Utah law or this policy, the more restrictive federal requirements shall govern the procurement of goods or services purchased with federal grant funds.

Any alleged violations of this policy or applicable law shall be reported in writing to the School's Director or Board of Directors.

Review

The School shall review this policy annually.

Maria Montessori Academy
Policy: Sex Education Instruction Policy
Approved: November 13, 2018
Reviewed:



Purpose

The purpose of this policy is to ensure that the Sex Education Curriculum taught at Maria Montessori Academy (the “School”) is compliant with state law.

Policy

The School will comply with applicable state law regarding the presentation of sex education instruction or instructional programs if the School elects to provide sex education instruction or instructional programs, including maturation education, at the School.

"Sex education instruction or instructional programs" means any course, unit, class, activity or presentation that provides instruction or information to students about: sexual abstinence, human development, including puberty and maturation, human reproductive processes, including conception, fetal development, pregnancy, and birth; reproductive anatomy and physiology; healthy dating practices, marriage and parenthood, in accordance with the success sequence as defined in Utah Code § 53G-10-402; adoption in accordance with Utah Code § 53G-10-404; information about contraceptive methods or devices in accordance with Utah Code § 53G-10-402(2)(b) and (c); chronic, infectious, and acute diseases and conditions of the reproductive system, including sexually transmitted infections and diseases; or refusal skills, as defined in Utah Code § 53G-10-402. While these topics are most likely discussed in courses such as health education, health occupations, human biology, physiology, parenting, adult roles, psychology, sociology, child development, and biology, this policy applies to any course or class in which these topics are the focus of discussion.

The Director shall establish administrative procedures to help the School comply with the requirements related to sex education instruction or instructional programs under Utah law.

Review

Every two years the Board of Directors will (a) review this policy; and (b) review data for the county in which the School is located regarding teen pregnancy, child sexual abuse, sexually transmitted diseases and sexually transmitted infections, and the number of pornography complaints or other instances reported in the School.

Signature:

Preston Allen, Board President

Date

Administrative Procedures Sex Education Instruction Procedures

These administrative procedures are established pursuant to the Sex Education Instruction Policy adopted by the School's Board of Directors.

In accordance with state law, all sex education instruction or instructional programs, which include all maturation education programs, will comply with the requirements of Utah Code § 53G-10-402 through -403 and Utah Admin Code R277-474.

The School's health curriculum will include instruction in the following topics, as required by Utah Code § 53G-10-402(2)(a)(ii):

- (a) the success sequence
- (b) community and personal health, including personal hygiene and the prevention of communicable disease;
- (c) physiology;
- (d) human development;
- (e) marriage and safe dating practices;
- (f) refusal skills;
- (g) resilience;
- (h) situational awareness;
- (i) the harmful effects of pornography;
- (j) the consequence of behaviors that pose a risk to individual health or of failure under the success sequence.

The School shall ensure that health curriculum instruction:

- (a) stresses the importance of abstinence from all sexual activity before marriage and fidelity after marriage as methods for: maintaining mental, physical, and social health, including reducing stress; eliminating risks associated with sexual activity, including preventing pregnancy and certain communicable diseases; and achieving the success sequence; and
- (b) personal skills that encourage abstinence, the return to abstinence, and fidelity.

The Director will establish a curriculum materials review committee composed of parents, school health educators, health professionals, and administrators. The committee will have at least as many parents as school employees. The School's Board of Directors will review and approve the membership of the committee on or before August 1 each year.

The curriculum materials review committee will meet on a regular basis, as determined by the members of the committee, select officers for the committee and designate a

committee chair, and comply with the Open and Public Meetings Act. The committee will review and make recommendations to the School's Board of Directors regarding instructional materials to be used by the School in connection with sex education instruction. Program materials and guest speakers supporting instruction on these topics must also be reviewed and approved by the curriculum materials review committee.

Instructional materials used by the School in connection with sex education instruction must be approved by the School's Board of Directors. These materials will comply with the requirements of applicable law and will be available for parents to review for a reasonable period of time prior to consideration for adoption by the Board of Directors.

The following topics may not be taught in the School:

- The intricacies of sexual stimulation or erotic behavior;
- The advocacy of premarital or extramarital sexual activity;
- The advocacy or encouragement of the use of contraceptive methods or devices (however, instruction that includes information about contraceptive methods or devices, not including abortion or any abortive methods, that stresses effectiveness, failure rates for youth, limitations, risks, and information on state law applicable to minors obtaining contraceptive methods or devices is allowed); or
- Any means or methods that facilitate or encourage the violation of any state or federal criminal law by a minor or an adult, including as a response to a spontaneous question from a student.

The School will comply with the student privacy laws in Utah Code § 53E-9-202 through -203, and obtain parental consent prior to any sex education instruction, including maturation education. At no time will a student be in the classroom during any such sex education instruction unless an approval form signed by the student's parent/guardian is on file. The parental notification form (aka the approval form) will:

- a) explain a parent's right to review proposed curriculum materials in a timely manner;
- b) request the parent's permission to instruct the parent's student in identified course material related to sex education instruction including;
- c) allow the parent to exempt the parent's student from attendance for a class period where identified course material related to sex education instruction is presented and discussed;
- d) be specific enough to give parents fair notice of topics to be covered;

- e) include a brief explanation of the topics and materials to be presented and provide a time, place and contact person for review of the identified curricular materials;
- f) be retained on file with affirmative parental consent for each student prior to the student's participation in discussion of issues protected under Section 53G-10-402; and
- g) be maintained at the School for a reasonable period of time.

Instructors may not intentionally elicit comments or questions about matters subject to parental consent requirements. Additionally, instructors' responses to questions spontaneously raised by students must be brief, factual, objective and in harmony with content requirements of this policy and state law. Responses must also be age appropriate and limited in scope to that reasonably necessary under the circumstances.

The School will ensure that all educators with any responsibility for any aspect of sex education instruction will receive appropriate professional development outlining the sex education curriculum and the criteria for sex education instruction. The School will ensure that educators receive this professional development at least once every three years. Additionally, the School will ensure that such educators are familiar with the student privacy requirements of Utah Code § 53E-9-202 through -203.

Any complaint or appeal concerning sex education instruction materials adopted by the School should be addressed in accordance with the School's Parent Grievance Policy or Staff Grievance Policy, as applicable.

Maria Montessori Academy
Policy: Capitalization and Expense Policy
Adopted: September 28, 2009
Amended: October 19, 2021



Purpose

The purpose of this policy is to allow for accounting to depreciate rather than expense qualified inventory items.

Policy

Items, including associated components necessary to use the item, which (a) have a fair market value over \$10,000.00 and (b) have a useful life of more than three (3) years shall be depreciated rather than expensed. The period of time items will be depreciated will be based on the length of the item's useful life.



Maria Montessori Academy
Policy: Fee Waiver Policy
Approved: February 9, 2021
Reapproved: March 8, 2022
Reapproved: February 21, 2023
Reapproved: August 17, 2023
Reapproved: September 26, 2024
Reapproved: March 12, 2026

Purpose

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

Policy

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

Definitions

“Common education expense”

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

“Course” or “class”

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

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

"Extracurricular activity"

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

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

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

"Fee" includes:

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

"Fee" does not include:

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

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

"Instructional equipment"

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

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

“Instructional supply”

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

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

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

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

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

“Personal student supply”

- (a) means, for a secondary student, an object, tool, material, or supply that:
 - (i) is the personal property of the student;
 - (ii) regardless of the use of the supply in the instructional process, individuals not enrolled in the course or activity also commonly purchase and use; and

- (iii) has a high probability of regular use in activities other than School-sponsored activities.
- (b) includes pencils, papers, notebooks, crayons, scissors, and basic clothing.

"Provided, sponsored, or supported by the School"

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

"Provision in lieu of fee"

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

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

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

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

- (a) meet specific requirements, including requesting a specific brand, fabric, or imprint;
- (b) the School requires a student to provide and to wear for an activity-, course-, or program-related activity; and

- (c) that the student rents while participating in the activity, or become the property of the student upon exiting the activity, course, or program.

“School activity clothing” does not include:

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

“School equipment” means a machine, equipment, facility, or tool that:

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

“Something of monetary value”

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

“Textbook”

- (a) means instructional material necessary for participation in an activity, course, or program, regardless of the format of the material;
- (b) includes:
 - (i) a hardcopy book or printed pages of instructional material, including a consumable workbook; or
 - (ii) computer hardware, software, or digital content; and
- (c) does not include School equipment, instructional equipment, or instructional supplies.

“Waiver” means a full release from:

- (a) a requirement to pay a fee; and

- (b) any provision in lieu of fee payment.

General School Fees Provisions

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

If the School imposes a fee:

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

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

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

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

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

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

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

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

Fees for Classes & Activities During the Regular School Day

Fees for Students in Kindergarten through Sixth Grade

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

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

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

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

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

Fees for Students in Seventh through Ninth Grade

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

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

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

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

- (a) relating to a non-fee course or a fee course, for:
 - (i) instructional equipment;
 - (ii) a School field trip or activity trip or performance, including related transportation, food, lodging, and admission charges or participation fees;
 - (iii) School activity clothing;

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

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

Fees for Optional Projects

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

Fees for Activities Outside of the Regular School Day

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

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

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

Fees for Extracurricular Activities

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

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

Other Miscellaneous Fees

Fees for Adult Education

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

Fees for Remediation Programs

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

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

Fees for Charter School Application Processing

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

Fee Schedule

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

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

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

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

Maximum Fee Amounts

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

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

Notice to Parents

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

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

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

Donations

The School may not request or accept a donation in lieu of a fee from a student or parent unless the activity, class, or program for which the donation is solicited will

otherwise be fully funded by the School and receipt of the donation will not affect participation by an individual student.

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

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

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

Fee Collection

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

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

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

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

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

Students shall be given notice and an opportunity to pay fines prior to withholding issuance of official written grade reports, diplomas and transcripts. If the student and the student's parent or guardian are unable to pay for damages or if it is determined by the School in consultation with the student's parents that the student's interests would not be served if the parents were to pay for the damages, then the School may provide

for a program of voluntary work for the student in lieu of the payment. A general breakage fee levied against all students in a class or school is not permitted.

Budgeting and Spending Revenue Collected Through Fees

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

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

School Fee Collections & Accounting Procedures

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

Fees must be received and deposited in a timely manner.

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

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

Fee Waiver Provisions

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

All fees are subject to waiver.

Non-waivable charges are not subject to waiver.

Fee Waiver Administration

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

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

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

Fee Waiver Eligibility

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

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

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

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

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

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

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

Fee Waiver Approval Process

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

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

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

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

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

Appeal Process

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

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

Alternatives to Fees and Fee Waivers

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

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

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

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

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

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

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

Fee Waivers for School Trips

Students may be granted a fee waiver for no more than two School-sponsored trips per school year. A student who has been granted a fee waiver for one School-sponsored trip may request a fee waiver for a second School-sponsored trip during the same school year. The fee waiver request for a second School-sponsored trip shall be

accompanied by an action plan, developed in consultation with and approved by the Principal, that addresses how the student or family will contribute to the School or community through one or more of: (a) participation in approved fundraising; (b) approved custodial work or 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 fee waiver request for a second School-sponsored trip shall be granted upon Principal 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.

For purposes of this section, "trip" and "action plan" have the meanings assigned to those terms in Utah Code § 53G-7-504.

Annual Review, Approval, and Training

The Board will review and approve this policy annually.

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

Maria Montessori Academy
Policy: Financial Reporting Policy
Adopted: September 12, 2017



Purpose

The purpose of this policy is to ensure that Maria Montessori Academy (the “School”) practices sound financial reporting in accordance with state and federal law and applicable accounting standards.

Policy

The School will ensure that financial reporting for the School is performed in accordance with Generally Accepted Accounting Principles (GAAP) and that audits of the School’s financial reporting are performed in accordance with Generally Accepted Auditing Standards (GAAS) and Generally Accepted Government Auditing Standards (GAGAS).

The School will provide financial reporting in a manner consistent with the basis of accounting as required by GAAP, as applicable to the School.

The School will provide reconciliation between the accrual basis of accounting and modified accrual basis of accounting, as applicable.

The School will provide data and information consistent with budgeting, accounting (including the uniform chart of accounts for LEAs), and auditing standards for Utah LEAs provided online annually by the Utah State Superintendent of Public Education.

Signature:

Board President

Date

SY26-27 LEA-S(pecific) Requests

Effective 8/2021, the following are NOT allowed for LEA-S: /

LEA (District or Charter) Name	Date LEA's Board Met	CACTUS ID	Last Name	First Name	Is this a RENEWAL Request from SY25- 26? (Y/N)	License Area 1	Endorsement 1
Granite SD	1/5/2021	999999	Example	Educator	N	Secondary	Math Level 3
Maria Montessori Academy		821300	Baird Johansen	Sara	Y	Elementary	
Maria Montessori Academy		793953	Davis	Faith	N	Secondary	Math Level 4 Sec
Maria Montessori Academy		792863	Epp	Thomas		Secondary	Physical Educatic
Maria Montessori Academy		827867	Hafan	Anna	N	Secondary	FACS Compreher
Maria Montessori Academy		787749	Householder	Hayley	Y	Secondary	
Maria Montessori Academy		824056	Pippin	Tarrin	N	Elementary	Science Integrate
Maria Montessori Academy		829239	Steinke	Kimberly	N	Elementary	

Audiologist, Deaf Education, Preschool Special Ed., School Psychologist, School Social Worker, Special Ed (K-12), Speech Language Pathologist,

Endorsement		Has LEA Specific				
Endorsement 2	3	Rational/Motions	Is Educator's Assignment in CACTUS? (Y/N)	tab in CACTUS been completed? (Y/N)	Does Educator Have a current BACKGROUND check? (Y/N)	Does Educator Have a current ETHICS check? (Y/N)
Chemistry		Educator is enrolling in EPP Fall 2021	Y	Y	Y	Y
		Enrolled in University Program	Y		Y	Y
Secondary Math			Y		Y	Y
on K-12		Renewing Associate and enrolling in APPEL	Y		Y	
English Language Arts		Enrolled in APPEL	Y		Y	Y
		Graduated and completed licensure progra	Y		Y	Y
ed		Will take Praxis to get science license	Y		Y	Y
			Y		Y	Y

Speech Language Therapist, School Counselor

Pedagogical Modules Completed and certificate received? (Y/N)	LEA Application Received? (Y/N)	PE ONLY: CPR Cert #
Y	Y	
Completed last year	Y	N/A
N/A	Y	N/A
		N/A
		N/A
N/A		N/A
N/A	Y	N/A
Y		N/A

Student Success Framework

Pursuant to UCA 53G-7-1304, Maria Montessori Academy's Board of Directors adopts the following framework to provide guidelines and processes for the development of a Teacher and Student Success Plan ("Plan"). The school's Director will develop a Plan in accordance with this framework and submit the Plan to the Board for approval. The Plan will be developed by integrating school-specific goals and criteria for improving the school's performance within the state accountability system.

The goal of the school's Plan shall be to improve school performance and student academic achievement. The Plan may contain any of the following strategies:

1. school personnel stipends for taking on additional responsibility outside of a typical work assignment;
2. professional learning;
3. additional school employees, including counselors, social workers, mental health workers, tutors, media specialists, information technology specialists, or other specialists;
4. technology;
5. before- or after-school programs;
6. summer school programs;
7. community support programs or partnerships;
8. early childhood education;
9. class size reduction strategies;
10. augmentation of existing programs; or
11. any other strategy reasonably designed to improve school performance or student academic achievement.

Funding received pursuant to the school Plan may not be used:

1. to supplant funding for existing education programs;
2. for administrative costs;
3. for capital expenditures.

Literacy Achievement Requirement

1. The Plan shall address the school's progress toward statewide literacy proficiency goals in accordance with SB 241 (2026) and State Rule R277-927.
2. If the school fails to meet statewide literacy goals, the school must dedicate at least 50% of TSSA funds toward evidence based literacy interventions and practices as described in 53G-7-921304(2)(e).