

### 3A.01.009 Fee Policy

#### ***I. PURPOSE***

The Excelsior Academy board of trustee adopts this policy to provide for the orderly establishment and management of a system of reasonable fees; to provide adequate notice to families of fees and fee waiver requirements; to establish a fair and efficient process for granting fee waivers; and to prohibit practices that would exclude students unable to pay fees from participation in school-sponsored activities or create a burden on a student or family as to have a detrimental impact on participation.

#### ***II. POLICY***

A. The school, school official, or employee may not charge or assess a fee or request or require something of monetary value as a condition to a student's participation in an activity, class, or program provided, sponsored, or supported by the school including for a co-curricular or extra-curricular activity, unless the fee has been approved by and included in the Excelsior Academy fee schedule.

B. To preserve equal opportunity for all students and to limit diversion of money and school and staff resources from the basic school program, Excelsior Academy shall limit student expenditures for school-sponsored activities, including expenditures for uniforms, clubs, clinics, travel, and subject area and vocational leadership organizations, whether local, state, or national.

C. The school shall provide notice to a parent of each student attending the school of all current fee schedules and the opportunity for fee waivers prior to the student being registered for a course, activity, or program to enable the parent and student to make an informed decision prior to committing to the student's enrollment or participation.

D. The school shall provide an opportunity for a parent to apply to have one or more fees waived (or be provided alternatives to waivers) and shall grant requested fee waivers (or alternatives to waivers) to students who are eligible under the provisions of this policy.

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

#### ***III. ESTABLISHING A FEE SCHEDULE***

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

1. regardless of how it is termed, described, requested, or required directly or indirectly;
2. in the form of money, goods, or services; and
3. that is a condition to a student's full participation in an activity, course, or program that is provided, sponsored, or supported by an LEA.

B. "Fee" includes:

1. money or something of monetary value raised by a student or the student's family through fundraising;
2. charges or expenditures for a school field trip or activity trip, including related transportation, food, lodging, and admission charges;
3. payments made to a third party that provides a part of a school activity, class, or program
4. charges or expenditures for classroom supplies or materials;
5. charges or expenditures for school activity clothing; and
6. a fine, other than a fine identified in the subsection below.

C. "Fee" does not include:

1. a student fine specifically approved by the Board for:
  - a. failing to return school property;
  - b. losing, wasting, or damaging private or school property through intentional, careless, or irresponsible behavior, or as described in Section 53G-8-212; or
  - c. improper use of school property, including a parking violation;
2. a payment for school breakfast or lunch;
3. a deposit that is:
  - a. a pledge securing the return of school property that is refunded upon the return of the school property; or
  - b. a charge for insurance, unless the insurance is required for a student to participate in an activity, course, or program or
4. Charges associated with a student's participation in a non-curricular club.

D. Fee Setting Process

When determining a fee proposal for Board approval, staff may consider the following factors:

- a) the school's cost to provide the activity, class, or program;
- b) the school's student enrollment;
- c) the median income of families enrolled in the school;
- d) the number and monetary amount of fee waivers, designated by individual fees, annually granted within the prior three years;
- e) the historical participation and school interest in certain activities;
- f) the prior year fee schedule;
- g) the amount of revenue collected from each fee in the prior year;
- h) fund-raising capacity;
- i) prior year community donors; and
- j) other resources available, including through donations and fundraising.

E. Board Approval of Fee Schedules and Policies

1. The Board shall annually review the provisions of this policy.
2. Fee schedules and policies for Excelsior Academy shall be adopted by the Board on or before April 1st of each year in a regularly scheduled public meeting of the Board.
3. Adoption of Excelsior Academy fee schedule may not be delegated to a community council, staff member, or any other advisory committee or group.
4. Prior to adopting the annual fee schedule, the Board shall encourage public participation in the process and provide an opportunity for the public to comment on the proposed fee schedule during a minimum of two public meetings of the Board.
5. The Board shall provide notice of the meetings:
  - a) to the public in accordance with the Utah Open and Public Meetings Act; and
  - b) to parents and students using the same form of communication regularly used to communicate with parents, including notice by e-mail, text, flyer, or phone call.
6. Minutes of the Board meeting during which the fee and fee policies are adopted together with copies of the approved policy and fee schedule shall be kept on file and made available upon request as required by UCA 52-4-203.

7. The Board may adopt amended fee schedules after the April 1st date following the same approval process used for the original fee schedule.

#### F. Fee Schedule Requirements

1. The Board's adopted fee schedule shall include:
  - a. a specific amount for each fee;
  - b. if a student is responsible for multiple fees related to one activity, class, or program, a clear and easy to understand delineation of each fee and the fee total for each activity, class, or program;
2. The amount of revenue raised by a student through voluntary individual fundraisers or required group fundraisers shall be included as part of the maximum fee amount per student for the activity and maximum total aggregate fee amount per student.
3. Beginning with the 2020-2021 school year, students and parents who do not qualify for fee waivers may not be required to pay an increased fee amount to make-up for or cover the costs of students and families who qualify for fee waivers.
  - a) In calculating the expense incurred by Excelsior Academy in relation to an individual student, the cost of providing fee waivers to fee waiver eligible students may not be considered.
  - b) Schools may notify students and families that they may voluntarily pay an increased fee amount or provide a donation to assist in covering the costs of other students and families.
4. Beginning with the 2021-2022 school year, a fee shall be equal to or less than the expense incurred by Excelsior Academy or school to provide for a student activity, course, or program.
  - a) An additional fee may not be charged, or a particular fee may not be increased to supplant or subsidize another fee.
5. A fee listed on the school fee schedule is the maximum amount which may be charged per student for a class or school sponsored or supported activity including uniforms, travel, and clinics, regardless of whether the activity is labeled as curricular, co-curricular or extra-curricular. The actual amount charged may be less.

#### ***IV. FEES FOR CLASSES AND ACTIVITIES DURING THE REGULAR SCHOOL DAY***

##### A. Elementary Grades (Grades K-5)

1. No fee may be charged in elementary grades for any regular school day activity including assemblies and field trips or for any snacks, materials, textbooks, instructional or school supplies, or fundraising such as "dress down days" except as provided in Subsection 2 below.
2. An elementary school or teacher may provide to a student's parent or guardian a suggested list of student supplies, as defined in this policy, for use during the regular school day so that a parent or guardian may furnish, on a voluntary basis, those supplies for student use. Such a list must include the following language:  
"Notice: The items on this list will be used during the regular school day. They may be brought from home on a voluntary basis, otherwise, they will be furnished by the school."
3. The school must provide any necessary school supplies not voluntarily furnished by a parent or guardian.

## B. Middle School (Grades 6-8)

1. Fees may be charged in connection with an activity, class, or program provided, sponsored, or supported by the school for a student in the middle school that takes place during the regular school day if the fee is on the Board approved fee schedule.
2. All fees are subject to the fee waiver provisions of this policy.
3. If a middle school class is established or approved, which requires payment of fees or purchase of items for students to participate fully and to have the opportunity to acquire all skills and knowledge required for full credit or highest grades, the fees or costs for the class must be approved by and appear on the Board fee schedule and shall be subject to the fee waiver provisions of this policy.
4. The school may require a middle school student to provide student supplies as defined in this policy.
5. If the school requires special shoes or items of clothing that meet specific requirements, including requesting a specific color, style, fabric, or imprint, the cost of the special shoes or items of clothing are considered a fee, and subject to fee waiver.
6. Beginning in the 2022-2023 school year schools may not charge a fee for:
  - a) a textbook. A textbook fee may only be charged for concurrent enrollment or advanced placement courses, and these fees are subject to fee waivers.
    - (1) "Textbook" means instructional material necessary for participation in a course or program, regardless of the format of the material including:
      - (a) books, printed materials, and consumable workbooks;
      - (b) computer hardware, software, or digital content; and
      - (c) cost of maintenance and replacement as a result of normal use.
    - (2) "Textbook" does not include instructional equipment.
7. Remedial courses and credit recovery fees are subject to all school fee requirements. These fees shall be placed on the school's fee schedule and are subject to fee waivers. Additionally, beginning with the 2022-23 school year, any instructional material provided for a student to complete a remedial course or credit recovery, is considered a textbook and therefore shall be provided free of charge.
8. The school may charge a fee for instructional equipment subject to fee waivers.
  - a) "Instructional equipment" means equipment or supplies required for a student to use as part of a secondary course that become the property of the student upon exiting the course.
  - b) "Instructional equipment" includes course related tools or instruments.
9. Excelsior Academy may charge the cost to access software, digital content, or other instructional materials that are required as part of an activity, course or program. These fees are subject to fee waiver.

## ***V. PROJECT RELATED COURSES***

A. In project related courses, projects required for course completion shall be free to all elementary school students and included in the approved course fee and be waivable for secondary students.

B. The school may require a student at any grade level to provide materials or pay for an additional discretionary project if the student chooses and the course teacher approves a project in lieu of, or in addition to, a required classroom project. The additional costs for the alternate project are not subject to fee waiver.

C. The school shall avoid allowing high cost additional projects, particularly if authorization of an additional discretionary project results in pressure on a student by teachers or peers to also complete a similar high cost project.

D. The school or teacher may not require a student to select an additional project as a condition to enrolling, completing, or receiving the highest possible grade for a course.

## **VI. SCHOOL ACTIVITIES OUTSIDE OF THE REGULAR SCHOOL DAY**

A. Fees may be charged in connection with any school-sponsored program or activity, that does not take place during the regular school day, regardless of the age or grade level of the student, if:

1. participation in the activity is voluntary;
2. the fee is on the Board approved fee schedule;
3. the amount collected from the student is equal to or less than the maximum fee amount on the approved fee schedule;
4. the fee revenue is collected in compliance with Excelsior Academy financial policies;
5. fee revenue is expended in compliance with the spend plan;
6. the fee is subject to the fee waiver requirements; and
7. for elementary schools, the student's participation in the activity does not affect a student's grade or ability to participate fully in any course taught during the regular school day.

B. An activity, class, or program outside of the regular school day or school calendar are subject to the provisions of this policy regardless of the time or season of the activity, class, or program.

## **VII. NOTICE TO PARENTS**

A. The school shall annually publish the Board's approved fee schedule, including fee maximums, and fee waiver policies on the school's website in an easily accessible location.

B. The parent of each student shall be provided a copy of the fee schedule, fee waiver policies, and the school fee documents required by Utah Administrative Code R277-407-6 annually in the school's registration materials and upon registration to the parent of a student who enrolls after the initial registration period.

C. Upon request, the school shall provide printed copies of school fee schedules, waiver policies, and documents to a parent or guardian who is unable or chooses not to access them through the school's website.

D. If more than 20% of the student or parent population of Excelsior Academy uses a single language other than English as their first language, Excelsior Academy will publish the fee schedule and fee waiver policies in the language of those families.

E. The Director shall make arrangements for a school representative to meet personally with each student's parent or family and make available an interpreter for the parent to understand the fee schedule and waiver policies when the student or parent's first language is a language other than English and Excelsior Academy has not published the information in the parent's first language.

## ***VIII. FEE WAIVERS***

### **A. General Fee Waiver Provisions**

1. “Waiver” or “fee waiver” means a full release from the requirement or payment of a fee and from any provision in lieu of a fee payment.
2. All fees are subject to fee waiver unless specifically identified as a non-waivable charge in this policy or UAC R277-407.
3. The school is not required to waive a non-waivable charge.
4. To ensure that no student is denied the opportunity to participate in a class or school sponsored or supported activity because of an inability to pay a fee, the school will provide for adequate waivers or other provisions in lieu of fee waivers.
5. The process for obtaining a fee waiver, pursuing an alternative to fee waiver, or appealing the denial of a fee waiver shall be administered confidentially, fairly, objectively, without delay, and in a manner that avoids stigma, embarrassment, undue attention, and unreasonable burdens on students and parents.
6. A student receiving a fee waiver or other provisions in lieu of a fee shall not be treated differently from other students or identified to students, staff members, or other persons who do not need to know of the waiver.
7. Any requirement that a student pay a fee is suspended during any period in which the student’s eligibility for a fee waiver is being determined or a denial of a fee waiver is being appealed.

### **B. Fee Waiver Eligible Charges**

Fees for the following are waivable regardless of whether they are held during the regular school day, during the regular school year, outside of the regular school day, outside of the regular school year, or during the summer:

1. An activity, class, or program that is:
  - a) primarily intended to serve school-age children enrolled in the school; and
  - b) taught or administered, more than inconsequentially, by a school employee as part of the employee’s assignment.
2. An activity, class, or program that is explicitly or implicitly required:
  - a) as a condition to receive a higher grade, or for successful completion of a school class or to receive credit, including a requirement for a student to attend a concert or museum as part of a music or art class for extra credit; or
  - b) as a condition to participate in a school activity, class, program, or team, including a requirement for a student to participate in a summer camp or clinic for students who seek to participate on a school team, such as cheerleading, football, soccer, dance, or another team.
3. An activity or program that is promoted by a school employee, such as a coach, advisor, teacher, school-recognized volunteer, or similar person, during school hours where it could be reasonably understood that the school employee is acting in the employee’s official capacity.
4. Admission, entrance, or gate fees for student attendance to an event or activity provided, sponsored, or supported by Excelsior Academy including:
  - a) athletic competitions;
  - b) music or theater program performances; and

- c) parent teacher organization activities.
- 5. An activity or program where full participation in the activity or program includes:
  - a) travel for state or national educational experiences or competitions;
  - b) debate camps or competitions; or
  - c) music camps or competitions.
- 6. A concurrent enrollment, CTE, or AP course.
- 7. Activity clothing required to be worn by a student when participating as a club, school group, or team such as matching jackets, hoodies, t-shirts or other like clothing.
- 8. Official curricular, co-curricular, and extra-curricular club or team uniforms that are required for student participation.

### C. Non-waivable Charges

Nonwaivable charges are costs, payments, or expenditures which are not considered to be school fees and are not subject to fee waivers.

- 1. Non-waivable charges include a personal discretionary charge or purchase for:
  - a) insurance, unless the insurance is required for a student to participate in an activity, class, or program;
  - b) college credit related to the successful completion of a concurrent enrollment class or an advanced placement examination; and
  - c) a personal consumable item such as a yearbook, class ring, letterman jacket or sweater, or other similar item, except when requested or required by a school as a condition to a student's participation.
- 2. Charges designated by Utah Code, federal law, or administrative rule not to be a fee are non-waivable charges including:
  - a) tuition for nonresident out-of-state students and foreign students, foreign student transcript translation fees and I-20 form processing charges;
  - b) a charge for an activity, class, program, that meets the criteria of a noncurricular club as described in Utah Code Title 53G, Chapter 7, Part 7, Student Clubs;
  - c) a charge for a school breakfast or lunch;
  - d) a fine for improper use of school property, including a parking violation; or
  - e) a fine for replacement of damaged or lost school property in accordance with Utah Code Ann. §53G-8-212.
    - (1) If the student and the student's parent are unable to pay for damages or if it is determined by the school in consultation with the student's parent that the student's interests would not be served if the parent were to pay for the damages, the school may provide for a program of work the student may complete in lieu of the payment.
    - (2) No fine may be assessed for damages which may be reasonably attributed to normal wear and tear.

### D. Fee Waiver Administrator

- 1. The Director shall designate at least one person at the appropriate administrative level to act as the "Fee Waiver Administrator." The designated individual shall:
  - a) be trained in and have a knowledge and understanding of school fees, the fee waiver process, and student data privacy laws; and
  - b) work in an appropriate setting to facilitate confidential conversations and documents.

2. The Fee Waiver Administrator shall be responsible to:
  - a) review fee waiver applications and verification documents;
  - b) grant or deny fee waiver requests;
  - c) compile all logs and maintain fee waiver documents in compliance with the Family Educational Rights and Privacy Act (FERPA); and
  - d) report fee waiver information.
3. The Fee Waiver Administrator's contact information will be available on the school's website with other school fee information and in student registration materials.
4. A student may not assist in the fee waiver approval process.

#### E. Fee Waiver Application Process

1. The school shall use the standardized state board school fees notice and fee waiver applications to inform parents of the process of obtaining a fee waiver.
2. The application for fee waiver shall be included on the school's website.
3. The fee waiver request process shall have no visible indicators that could lead to identification of fee waiver applicants.
4. A parent or student desiring to have one or more fees waived shall submit a completed fee waiver application and verification of eligibility to the Fee Waiver Administrator.
  - a) A family having more than one student enrolled in the school may submit one application which will determine eligibility for fee waivers for all students in the family. The application for fee waiver must be submitted to the school at which the oldest student is enrolled and clearly identify the names, grade levels, and schools of attendance of the other students in the family.

#### F. Fee Waiver Eligibility Verification

1. A student is eligible for and will be granted a fee waiver if the Fee Waiver Administrator receives a completed application and verification of one of the following from the student or parent:
  - a) The student's family income qualifies under the levels set by the State Superintendent or State Board of Education and the parent provides verification in the form of income statements, pay stubs, or tax returns:
    - (1) these levels are set to correspond to the income levels for the federal free lunch program and may be found at [schools.utah.gov/schoolfees](http://schools.utah.gov/schoolfees) on the fee waiver application form;
    - (2) all income received by the household is considered including salary, public assistance benefits, social security payments, pensions, unemployment compensation and child support payments.
  - b) The student receives Supplemental Security Income (SSI) and the parent provides benefit verification documents from the Social Security Administration.
  - c) The student's family receives Temporary Assistance for Needy Families (TANF) and the parent provides benefit verification from the Utah Department of



Workforce Services for the period for which the fee waiver is sought which may be in the form of an electronic screenshot of eligibility determination or status.

d) The student is in foster care through the Division of Child and Family Services; or is in state custody and the individual seeking the waiver provides the youth in care required intake form and school enrollment letter, provided by a case worker from the Utah Division of Child and Family Services or the Utah Juvenile Justice Department.

2. The school shall ensure that a fee waiver or other provision in lieu of fee waiver is available to any student whose parent is unable to pay.

a) A Fee Waiver Administrator may grant a fee waiver to a student, on a case by case basis, who does not qualify for a fee waiver under the criteria above, but who, because of extenuating circumstances is not reasonably capable of paying the fee.

b) An opportunity will be provided for those requesting a fee waiver under this standard to meet privately with the Fee Waiver Administrator to discuss their situation and potential eligibility for fee waiver.

c) Verification may be collected as appropriate for the situation.

#### G. Notification of Eligibility

1. After reviewing the documentation provided by the student and the student's parent, the Fee Waiver Administrator will approve or deny the fee waiver request.

2. The Fee Waiver Administrator shall not retain required fee waiver verification documents or copies of the verification documents but will keep the following information as a log or record:

a) That the student's eligibility was verified;

b) The name and position of the person who reviewed the verification documents;

c) The date it was verified; and

d) The type of documentation used to verify eligibility.

3. The Fee Waiver Administrator shall maintain documentation of the following:

a) The school year the request was submitted;

b) The type and amount of fees requested to be waived;

c) Whether the request was approved or denied;

d) If approved, the type and amount of fees which were waived.

4. The Fee Waiver Administrator shall provide written notice of the decision to grant or deny a fee waiver request to the student's parent using the standardized state board fee waiver decision and appeal form.

5. If a fee waiver request is denied, the written notice of decision shall include the reason the request was denied and a copy of the appeal process and appeal form.

#### H. Appeal of Fee Waiver Denial

A. A student or the student's parent may appeal the decision to deny a fee waiver request by completing and submitting the appeal form included with the denial or found on the school website to the Administrative Director within 10 school days of receiving notice of denial.

B. 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.

C. If after meeting with the school director the waiver is still denied, the parent may appeal, in writing, within ten (10) school days of receiving notice of denial, to the Executive Director.

## ***IX. COLLECTION OF SCHOOL FEES***

A. The school may make an installment payment plan available to a parent or student to pay for a fee, however, an installment payment plan may not be required in lieu of a fee waiver.

B. A student may not collect or receive student fees from other students or parents.

C. The school may pursue reasonable methods for collecting student fees, but may not, as a result of unpaid fees:

1. exclude a student from a school, an activity, class, or program that is provided, sponsored, or supported by Excelsior Academy during the regular school day;

2. refuse to issue a course grade; or

3. deny a former or current student receipt of official student records, including written or electronic class schedules, grade reports, diplomas, or transcripts.

D. The school may impose a reasonable charge to cover the cost of duplicating, mailing, or transmitting transcripts and other school records.

E. The school may not charge for duplicating, mailing, or transmitting copies of school records to an elementary or middle school in which a former student is enrolled or intends to enroll.

F. If the school's property has been lost or willfully cut, defaced, or otherwise damaged, the school may withhold the issuance of an official written grade report, diploma, or transcript of the student responsible for the damage or loss until the student or the student's parent has paid for the damages in accordance with 53G-8-212(2)(a).

G. Notwithstanding Subsection D, the school may not withhold any records required for student enrollment or placement in a subsequent K-12 school.

## ***X. FUNDRAISING***

A. Any fundraising activity must be approved and conducted in accordance with Excelsior Academy Fund Raising Policy.

1. The school may not authorize, establish, or allow for required individual fundraising.

2. The school may allow optional individual fundraising opportunities for students to raise money to offset the cost of the student's fees.

3. The school may allow for group fundraisers.

B. The school shall not deny a student membership in or participation on a team or group or in an activity based on the student's non-participation in a fundraiser.

C. Schools seeking to use alternative methods of raising revenue must comply with Excelsior Academy Fundraising Policy and UAC R277-113.

#### ***XI. DONATIONS IN LIEU OF FEES.***

A. 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.

B. 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.

C. Actions to solicit or accept a donation or contribution must be in compliance with all Board policies, must clearly state that donations and contributions by a student or parent are voluntary, and may not place any undue burden on a student or family.

#### ***XII. SCHOOL REPORTING REQUIREMENTS***

1. The Director and Board Chair shall submit a Certification of Compliance annually affirming compliance with the provisions of this policy.

2. The Executive Director shall submit a Certification of Compliance annually affirming compliance with the provisions of this policy and submit the following forms:

- a. Student Fee Schedule with Spend Plan
- b. School Fee Policy
- c. School Fee Waiver Policy
- d. Notice of Fee Waiver Criteria provided by the LEA to student's parents

3. The school shall maintain records and submit documentation to the School Fee Administrator annually of:

- a. number of students enrolled as of October 1
- b. number of students granted fee waivers
- c. dollar amount of fees waived
- d. number of students who worked in lieu of fee waivers
- e. dollar amount of fees collected from students
- f. dollar amount of fees collected from students for curricular activities
- g. dollar amount of fees collected from students for co-curricular activities
- h. dollar amount of fees collected from students for extracurricular activities

#### ***XIII. TRAINING***

Excelsior Academy shall provide for annual training of school employees on fee related policies enacted by the Board specific to each employee's job function.

#### ***XIV. PENALTIES FOR VIOLATION OF SCHOOL FEE POLICY***

- A. Any administrator, teacher, advisor or coach who knowingly violates the authorized fee schedule and financial policies as approved annually by the Board will be subject to disciplinary action as outlined by Excelsior Academy Policy.
- B. Monies collected beyond the approved fee schedule will be refunded by the school back to the individual student(s).
- C. If the school violates the authorized fee schedule and financial policy, the Board may impose the following:
1. Issue a letter of reprimand to the individual(s) and/or Director.
  2. The principal, teacher, coach/advisor, and/or the school may be assessed a fine not to exceed \$200.

#### ***XV. DEFINITIONS***

Definitions applicable to this policy are intended to be consistent with UAC R277-407. In the case of a discrepancy, the administrative code shall prevail.

- A. "Co-curricular activity" means an activity, course, or program, outside of school hours, that also includes a required regular school day program or curriculum.
- B. "Curricular activity" means an activity, a course, or a program that is:
1. provided, sponsored, or supported by an LEA; and
  2. conducted only during school hours.
- C. "Extra-curricular activity" means an activity or program for students, outside of the regular school day, that:
1. is sponsored, recognized, or sanctioned by an LEA; and
  2. supplements or compliments, but is not part of, the LEA's required program or regular curriculum.
- D. "Fundraiser," "fundraising," or "fundraising activity" means an activity or event provided, sponsored, or supported by a school that uses students to generate funds to raise money to:
1. provide financial support to the school or any of the school's classes, groups, teams, or programs; or
  2. benefit a particular charity or for other charitable purposes.
- E. "Fundraiser," "fundraising," or "fundraising activity" may include:
1. the sale of goods or services;
  2. the solicitation of monetary contributions from individuals or businesses; or
  3. other lawful means or methods that use students to generate funds.
- F. "Fundraiser," "fundraising," or "fundraising activity" does not include an alternative method of raising revenue without students.
- G. "Group fundraiser" or "group fundraising" means a fundraising activity where the money raised is used for the mutual benefit of the group, team, or organization.

H. "Individual fundraiser" or "individual fundraising" means a fundraising activity where money is raised by each individual student to pay the individual student's fees.

I. "Noncurricular club" has the same meaning as that term is defined in Section 53G-7-701.

J. "Provided, sponsored, or supported by the school" means an activity, class, program, fundraiser, club, camp, clinic, or other event that:

1. is authorized by an LEA or school, according to local education board policy; or
2. satisfies at least one of the following conditions:
  - a) the activity, class, program, fundraiser, club, camp, clinic, or other event is managed or supervised by an LEA or school, or an LEA or school employee;
  - b) the activity, class, program, fundraiser, club, camp, clinic, or other event uses, more than inconsequentially, the LEA or school's facilities, equipment, or other school resources; or
  - c) the activity, class, program, fund-raising event, club, camp, clinic, or other event is supported or subsidized, more than inconsequentially, by public funds, including the school's activity funds or minimum school program dollars.

K. "Provided, sponsored, or supported by the school" does not include an activity, class, or program that meets the criteria of a non curricular club as described in Title 53G, Chapter 7, Part 7, Student Clubs.

L. "Provision in lieu of fee waiver" means an alternative to fee payment or waiver of fee payment.

M. "Provision in lieu of fee waiver" does not include a plan under which fees are paid in installments or under some other delayed payment arrangement.

N. "Regular school day" has the same meaning as the term "school day" described in Section R277-419-2.

O. "Requested or required by an LEA 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:

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

P. "Something of monetary value" 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.

Q. "Something of monetary value" includes:

1. charges or expenditures for a school field trip or activity trip, including related transportation, food, lodging, and admission charges;

2. payments made to a third party that provide a part of a school activity, class, or program;
3. classroom supplies or materials; and
4. a fine, except for a student fine specifically approved by an LEA 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.

R. "Student supplies" means items which are the personal property of a student which, although used in the instructional process, are also commonly purchased and used by persons not enrolled in the class or activity in question and have a high probability of regular use in other than school-sponsored activities.

S. "Student supplies" include:

1. pencils;
2. paper;
3. notebooks;
4. crayons;
5. scissors;
6. basic clothing for healthy lifestyle classes; and
7. similar personal or consumable items over which a student retains ownership.

T. "Student supplies" does not include items listed above if the requirement from the school for the student supply includes specific requirements such as brand, color, or a special imprint in order to create a uniform appearance not related to basic function.

## **REFERENCES**

Utah Code Ann. §53G-6-402(5) – Open enrollment options – processing fee.  
Utah Code Ann. §53G-6-604 – Requirement of school record for transfer of student.  
Utah Code Ann. §53G-8-212 – Defacing or damaging school property – Student’s liability – Work program alternative. Utah Code Ann. Title 53G, Chapter 7, Part 5 – Student Fees  
Utah Code Ann. Title 53G, Chapter 7, Part 6 – Textbook Fees Utah Code Ann. Title 53G, Chapter 7, Part 7 – Student Clubs Utah Code Ann. Title 53G, Chapter 7, Part 8 – School Uniforms  
Utah Administrative Code R277-113 – LEA Fiscal and Auditing Policies Part 7 – School Sponsored Activities Utah Administrative Code R277-407 – School Fees  
Utah Administrative Code R277-713 – Concurrent Enrollment of High School Students in College Courses. Permanent Injunction Civil No. 920903376

**Policy Review Schedule:** To be done yearly.

## **Document History:**

Date Adopted: March 13, 2015

Amended: Oct 4, 2017: added minor changes to grade levels and calling the school Middle School instead of Jr. High. Minor changes to the fee schedule as well.

Amended Nov 4, 2017: Changed format

Amended May 2018: Changed Fee Schedule costs.

Amended February 2020: Changed Fees

Amended May 22, 2020: Substantially changed policy language but did not change fee part.

Amended July 2020: Removed the Fee break down from the fee policy. Created two policies out of one. Renamed this to Fee Policy and named the cost breakdown as the Fee Schedule.