



MOUNTAIN WEST
Montessori Academy

Charter School Application 2014-2015

I. Charter School Information

1. Name of proposed charter school: Mountain West Montessori Academy			
2. Name of applicant: Angie Johnson			
3. Authorized agent: Angie Johnson			
4. Mailing address: 2869 Chalk Creek Way; South Jordan, UT 84095			
5. Phone number: (801) 580-4972		6. Email address: sweetsassafrassy@msn.com	
7. District(s) where proposed charter school is located: Jordan School District			
8. District contact(s) and date complete application submitted to district(s). (NOTE: repeat this statement for each district in which the school may be located.) Submitted to <u>Shelley Nordick</u> , who works at Jordan School District on <u>April 2, 2012</u> , <u>September 17, 2012</u> , and <u>December 27, 2012</u> .			
9. Form of organization (check) <input checked="" type="checkbox"/> Nonprofit Corporation <input type="checkbox"/> Tribal entity <input type="checkbox"/> Other			
10. The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below. (Add lines as necessary)			
Name	Email	Type of Member (e.g., parent, business)	Position on Board (e.g., chair, secretary)
Angie Johnson	sweetsassafrassy@msn.com	Educator	President
Steve Barnes	stevebarnes93@gmail.com	Parent & Civil Servant	Vice President
Dan Galli	dan@myrealtysolutions.com	Parent & Real Estate	Vice President
Linda Hume	linda@humefamily.org	Accountant & Educator	Financial Coordinator
Rusty Bentley	rusty.bentley@accessdevelopment.com	Parent & Businessman	Secretary
11. Year school will start: 2014-2015		12. Number of instructional days: 180	
13. Grades served: K-9		14. Hours of instruction: 990 hours minimum	
15. Projected Enrollment (Complete growth model through the appropriate operational years): 536 students			

Operational Year 1 (2014-2015): Total: 474 Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 0
 Operational Year 2 (2015-2016): Total: 536 Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 62
 Operational Year 3 (2016-2017): Total: 536 Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 62
 Operational Year 4 (2017-2018): Total: 536 Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 62
 Operational Year 5 (2018-2019): Total: 536 Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 62

Ultimate Enrollment: Total: 536, Grades K-6: 350, Grades 7-8: 124, Grades 9-12: 62

Does proposed grade configuration match resident district grade configuration?

- Yes
- No

16. Target percentage of students with an Individualized Education Plan <p style="text-align: center;">10%</p>	17. Target percentage of students identified as minority <p style="text-align: center;">15%</p>
18. Target percentage of students qualifying for free or reduced lunch (i.e., economically disadvantaged) <p style="text-align: center;">25%</p>	19. Is this a conversion? <input type="checkbox"/> Yes (include required signatures and proof of local board approval in Section 19) <input checked="" type="checkbox"/> No
20. Does the charter school intend to participate in Utah Retirement System? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	21. A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers. Provide details regarding the need for the waiver as Attachment I). <p style="text-align: center;">N/A</p>
22. List persons whom you have designated as Founding Members of the school. Children of a Founding Member (an individual who has had a significant role in the development of a charter school application), children of an employee, and siblings of students currently attending the charter school are eligible for preferential enrollment under both State and Federal Charter School law. Also, identify the percentage of students eligible for preferential enrollment under the status of founder’s child or employee child. <p style="text-align: center;"> Angie Johnson Linda Hume Dan Galli Rusty Bentley Steve Barnes </p> <p>Mountain West Montessori Academy intends to offer preferential enrollment to individuals who play a significant role in the start-up of the school. Founding Members will be composed of parents and community members who are designated by the Governing Board of Directors and submitted to the State Charter School staff prior to the opening day of school.</p> <p>The percentage of students eligible for Founding Member and staff preference will not exceed five percent (5%) of the ultimate enrollment.</p>	

II. Assurances

The applicant charter school hereby assures and certifies to the Utah State Charter School Board and Utah State Board of Education that: Read and Check

- ✓ The charter school will make provision for such fiscal control, fund and program accounting procedures as may be necessary to assure proper disbursement and accounting for all funds, and will utilize fiscal procedures that are consistent with generally accepted standards of fiscal management.
- ✓ The charter school will not expend program funds for any education program, activity, or service related to sectarian instruction or religious worship.
- ✓ The charter school assures that resources will be available and a process established to develop a Student Education Plan/Student Education Occupation Plan (SEP/SEOP) for each student.
- ✓ The charter school will maintain an active parent/guardian involvement process including some formal mechanism for meaningful involvement in site-based decision making.
- ✓ The charter school will not charge tuition or fees, except those fees allowed by law. Governing Boards will adopt allowable fees annually in an open board meeting.
- ✓ A copy of the charter will be supplied to interested individuals or groups on request.
- ✓ The charter school will be fully accredited no later than its third year of operation.
- ✓ The charter school will acquire and maintain nonprofit corporate status.
- ✓ The charter school will acquire and maintain all required insurances, including General Liability Coverage for both Bodily Injury and Property Damage Liability at \$2 million per occurrence; perhaps, with an annual aggregate amount; Automobile Liability Coverage for Bodily Injury and Property Damage at \$2 million per occurrence including PIP coverage; Personal Injury / Civil Rights Coverage for claimed Constitutional violations and claimed violations of federal and state law at \$2 million per occurrence; Errors and Omission Coverage for, among other things, actions taken by directors and board members who govern the school at \$2 million per occurrence; Government Crime Policy including employee theft, faithful performance, and coverage for employee and officer bonds; Property Coverages - probably a standard all-risk property policy with possible endorsements for Business Interruption, Extra Expense and Tuition Fee coverage; Workers' Compensation Coverage at such amounts and limits as required by Utah law; and Treasurer's Bond. If coverage will be provided outside of State Risk Management, applicant provides a letter from the tentative insurer indicating a willingness to provide the coverage mentioned above and includes it in Section 19.
- ✓ The charter school will maintain accurate student transcripts.
- ✓ The charter school is nonsectarian in its programs, admission policies, and employment practices and all other operations.
- ✓ The charter school Principal/Director shall attend a one-day special education training class sponsored by the Utah State Office of Education prior to the first day of instruction and annually thereafter.

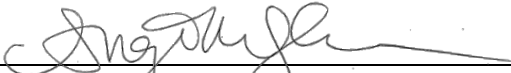
- ✓ The governing board will name and provide email contact information for the following individuals prior to opening and at any time the school makes changes to these positions: Board Chair, Executive Director, Principal, Assistant Principal, Assessment Director, Special Education Director, Title IX Civil Rights Monitor Officer, Section 504 Coordinator, and Business Official.
- ✓ The charter school applicant certifies all information contained in this application is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. The charter school applicant understands that incomplete applications will not be considered.
- ✓ The charter school applicant acknowledges that it has read all Utah statutes regarding charter schools and that, if approved, it is subject to and will ensure compliance with all relevant federal, state and local laws and requirements. The charter school applicant acknowledges that, if approved to operate a charter school, it must execute a charter contract with the Utah State Charter School Board within twelve months of the date of approval of the charter by the Utah State Board of Education and must begin providing educational services within the timeframe outlined in the charter. Failure to do so may result in revocation of the charter approval and, if applicable, termination of the contract and revocation of the charter.

The authorized agent of the applicant charter school certifies that, to the best of his/her knowledge and belief, the data in this application are true and accurate, and that the applicant will comply with the assurances noted above if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.

III. Signatures

WE, THE UNDERSIGNED, do hereby agree to the certifications contained in *Section II. Assurances* above.

Name of Authorized Agent: Angie Johnson

Signature of Authorized Agent: 

Name of Charter School Board Chair (if different than Authorized Agent): N/A

Signature of Charter School Board Chair (if different than Authorized Agent): N/A

Table of Contents

Section 1 School Purpose and Goals	1
Section 2 Student Population	7
Section 3 Calendar and Bell Schedule	13
Section 4 Market Analysis	17
Section 5 Capital Facility Plan	31
Section 6 Detailed Business Plan and Budget	36
Section 7 Fiscal Procedures	45
Section 8 Organizational Structure and Governing Body	51
Section 9 Comprehensive Program of Instruction	88
Section 10 School Closure Plan	120
Section 11 Dismissal Procedures and Suspension/Expulsion	126
Section 12 Complaints	133
Section 13 Parental Involvement	134
Section 14 Employees	136
Section 15 Services	155
Section 16 Extra-Curricular Activities	179
Section 17 Special Education	180
Section 18 Additional Information	188
Appendix A Charter School Lottery Policy	189
Appendix B Budget Form	191
Appendix C Purchasing Policies and Procedures	195
Appendix D Suspension/Expulsion Policy	209
Appendix E Complaint Policy	238
Appendix F Employment of Relatives Policy	242
Appendix G Acceptable Use and Social Media Policy	244
Appendix H Extra-Curricular Activities Policy and Fee Schedule	253
Appendix I Waiver Requests	255

Section 1

School Purpose and Goals

Executive Summary

Mountain West Montessori Academy (MWMA) will provide student-centered, individualized education, based on Montessori research-based best practices, to a community that is currently clamoring for educational options. The school will be based on the Montessori philosophy of education, which is well established worldwide. The educational program will focus on interdisciplinary connections and hands-on learning experiences. Classrooms will be mixed-age and include a lower elementary, upper elementary and junior high. We will nurture students' natural intellectual curiosity by allowing them choices that fit their learning style, interests, and readiness. We additionally plan to address the social and emotional needs of each student through a safe and comfortable environment and development of a culture of respect and peaceful interaction in the school community.

MWMA will serve students in South Jordan and surrounding communities of all income levels, cultural backgrounds, and academic abilities. Our vision is to bring the benefits of Montessori education to a wider group of students in Utah, and our mission statement is as follows:

Founded upon Montessori philosophy, the mission of Mountain West Montessori Academy is to facilitate student-centered learning and intellectual curiosity through an individualized and interdisciplinary curriculum, hands-on experience, and community involvement.

The Mountain West Montessori Academy Governing Board of Directors is comprised of parents and professionals desiring a public Montessori option in the South Jordan area. Each Board Member has exceptional skills and experience that will create a solid foundation in governance to steer the mission and vision of the school.

The Governing Board of Directors at MWMA was formed through professional relationships between concerned parents and citizens in the South Jordan area. The Board President, in the process of obtaining her master's degree in math education, realized the potential and demand for establishing a public Montessori school in South Jordan. The only current educational program offering a Montessori education in the South Jordan area is a private school, with a high tuition. The Board President, in her educational endeavors, found many potential Board Members and parents interested in establishing a South Jordan Montessori charter school.

The current Board Members became involved as they saw the opportunity for promoting additional educational opportunities for the youth of our area. Each Board Member possesses essential skills and expertise, forming a quality Board. While working on the charter application many parents contacted the current Board Members about the timeline for opening the school.

As President of the Governing Board of Directors, Angie Johnson has extensive knowledge developing Montessori academic programs, including implementing curriculum and reviewing assessments to increase student achievement. Her leadership was imperative to co-founding a nonprofit middle school program at the Montessori of Riverton, as well as organizing the corporate structure and establishing the management system for a dental practice. Angie believes in utilizing innovative teaching methods to advance education and understands teacher needs based on her experience as an educator in the classroom setting and managing employees. Angie's organizational nonprofit background makes her a natural fit for Board President. Angie understands the need to maintain high teaching standards, manage sound fiscal budgets, as well as develop and monitor policies. Her passion and commitment to the Montessori model will help the Governing Board of Directors guide the school to success.

Vice President of MWMA Governing Board of Directors is Steve Barnes. Mr. Barnes is an elected Councilman for South Jordan City and strives to serve the residents of the community in areas of need. Steve understands the functions a governing board serves and has participated in a variety of leadership trainings through the city, which he will be able to share with his fellow MWMA Board Members. In addition to his board experience, Steve has been involved in public and church education. As a substitute teacher and LDS seminary teacher, Steve understands the complexity of a classroom and student needs. His background has led him to consider Montessori education an appropriate avenue for hands-on student learning that will lead to community involvement. Steve's proficiency in working with the community, understanding local government, and commitment to public service adds valuable expertise to MWMA's Governing Board of Directors.

Dan Galli also serves as Vice President on the MWMA Governing Board of Directors. As a long-time resident and realtor in South Jordan, he understands the area's unique needs. Dan owns Realty Resolutions and is assisting in the creation of the Assisted Living of South Jordan, a luxury elderly residence facility. He understands the demands of running a business, managing employees, and being financially sound. Dan's entrepreneurial spirit will help the Governing Board of Directors implement the vision of MWMA. Dan has strong people skills, understands the demographics and needs in the community, and has experience in locating and brokering land purchases. His desire to increase public school offerings and encourage student-centered learning is an asset to the Governing Board of Directors.

The fourth member of the Governing Board of Directors is Rusty Bentley, who serves as the Board Secretary. Rusty is employed as the President of TriQuest (the fundraising division of Access Development) and has also been the Vice President of Marketing and Operations at TriQuest. In these executive roles, Rusty has developed marketing programs and has gained an unparalleled understanding of effective fundraising. Rusty understands supervisory roles at all levels and values the standards of governance. Rusty's experience provides the school with a unique ability to monitor reports, summarize detailed information, as well as forecast high-level

expectations for the school and administration. Rusty understands the needs of the individual child and believes that each student's learning experience will be different based on learning styles and personalities. He supports MWMA because of the focus on the student's ability to drive learning towards interest-based projects with teacher guidance.

The Financial Coordinator on the Governing Board of Directors is Linda Hume. Linda provides the view of a parent whose children have thrived in the Montessori environment. She has a deep understanding of the Montessori program and its benefit to every student in our society. Linda has worked at a nonprofit Montessori school and understands firsthand the successes of a Montessori education. At the Montessori school she acted as business manager and will bring information technology skills, management techniques, and experience to the creation and startup of MWMA.

Linda Hume received her Masters of Accounting from University of Utah and is now an associate lecturer. She understands not only the detailed fiscal demands of a business and a school, but she can also relate those intricacies to others. Linda will help educate the Board Members on the details of the budget at Board Meetings and will be able to coordinate with the Director to create and implement an overall school budget with sound fiscal policies and procedures. Linda's service on the Governing Board of Directors will be beneficial for prospective families to understand the Montessori Philosophy, and her diligence will help the school maintain high fiscal standards.

As a whole, the Governing Board of Directors will utilize each Board Member's background and expertise to *facilitate student-centered learning and intellectual curiosity*. They believe that the Montessori curriculum will allow students to make relevant connections to real-world concepts and will work diligently to serve the mission and vision of Mountain West Montessori Academy.

Students in our area lack ready access to Montessori schools and Montessori learning materials, as there are very few Montessori schools in the southern part of the Salt Lake Valley. All of the Montessori schools that are located in the area are private, and the tuition of these schools is prohibitively expensive for many of our prospective students. The adoption of the Utah Core Curriculum, supported by current research, indicates a desire for greater inquiry focused educational strategies. As a group, the Founders of MWMA recognize the need for an individualized educational program that is student-centered. The Montessori philosophy is based on educational strategies that promote students building their own knowledge through choice and engagement in a well-prepared environment. There are currently nearly 10,000 K-9 students at the Jordan School District schools in South Jordan alone. The lack of a public Montessori option coupled with the high numbers of children and continued growth in South Jordan area will create a demand for MWMA. MWMA's educational model is effective with all student populations; however, data indicates that citizens of South Jordan have a high general educational level in comparison with surrounding cities. The Board believes this demographic translates into more

parents receptive to and searching for educational choice. Overcrowding has forced the district to move many of the South Jordan elementary schools to year round schedules. When this overcrowding is considered, we believe that MWMA will provide our target population with a very attractive alternative that is not currently available to them.

Our basic premise is to use our talents as a Governing Board of Directors, the efficiency of a small organization, and the expertise of a national curriculum to create a school that will teach the Utah Core Curricula to students using Montessori techniques and materials, in an environment where paraprofessionals, in every elementary classroom, lower student-to-staff ratios. The Governing Board of Directors of MWMA wants to offer a choice to parents, which does not over-emphasize direct instruction and which, through the Montessori philosophy, accentuates higher-level problem-solving skills and depth of knowledge.

Mission Specific Goals

The MWMA Governing Board of Directors will conduct an annual survey with all stakeholders, inclusive of parents and staff, which will address a variety of school topics including mission specific goals. Data from the survey will be analyzed by the Board and may be disseminated through an annual stakeholders report. Appropriate adjustments in mission goals will be made based on stakeholder feedback.

<i>Indicator – Upholding mission and purpose</i>		
Measure	Metric	Board Goal
School Community Involvement	MWMA will survey parents annually to measure how many parents use Montessori methods/ideas at home, as a result of parent and child education	90% of parents surveyed will indicate they have integrated Montessori methods/ideas into their home
Interdisciplinary Curriculum	All elementary teachers will do a minimum of two “Great Lessons” annually. “Great Lessons” require a minimum of three integrated curriculum areas	100%
Elementary students’ hands-on experiences	Percentage of students using individual work plans showing the use of manipulatives or student-created materials each week	100%

Junior High MWMA students' interest-based project	Percentage of students completing at least one interest-based project in their portfolio each year	100%
---	--	------

Purpose

Encourage the use of Different and Innovative Teaching Methods

Mountain West Montessori Academy will clearly meet this purpose in employing Montessori philosophy and teaching techniques. Individualized, guided-discovery learning, which makes extensive use of hands-on materials and activities, is not widely available as an educational option for Utah students.

Montessori represents:

- Innovative education due to mixed-age classrooms
- Student choice of activity from within a prescribed range of options
- Specialized educational materials
- Uninterrupted blocks of work time
- Constructivist “discovery” model wherein learners build their own knowledge

Innovation refers to the creation and use of better or more effective processes or ideas, and Montessori education is innovative—and furthermore, fosters innovators. The founders of Google, Amazon, and Wikipedia all credit the joy they take in discovery to their Montessori educations (Sims, 2011). MWMA’s goal is to fan the flames of intellectual curiosity in students who will ask, “what if?” and “why not?”

Increase Choice of Learning Opportunities for Students

MWMA students will be afforded the opportunity to develop autonomy and increase their engagement in the learning process by exercising choices (Reeve & Tseng, 2011) within a framework of carefully chosen options in the prepared classroom environment. An environment where students can choose among different activities as they learn a given concept ensures that individual learning styles are addressed. Students who are active participants in their own education love to learn, and when students make choices they become invested in their own learning process. This results in improved student learning and, furthermore, shows respect for the student as a capable individual. MWMA addresses student choice in the following ways:

- Individual work plans
- Student selection of materials (from a range of options)

- Interest-based projects
- Constructivist learning theory
- Opportunities for independence

The Montessori Philosophy is based on providing choice for students within the learning environment, thereby fostering student independence and interdependency. Maria Montessori stated, “Never help a child with a task at which he feels he can succeed.”

Section 2

Student Population

Target Population

Mountain West Montessori Academy (MWMA) will be an educational option for families seeking a unique instructional program. We believe that the Montessori Philosophy is adaptable to any student regardless of age and background and will cultivate intellectual curiosity through our individualized and integrated curriculum as stated in the school's mission. The Montessori Philosophy provides a variety of advantages over traditional education, one of which is allowing for students from different backgrounds to learn together in multi-age classrooms to enhance student learning.

The ideal MWMA student will be a self-starter with an absorbent mind. The student will be able to excel in a prepared environment and see order in the world around them. They will be curious, willing to pursue interests, able to learn from adults and older students, and able to perform individual and group tasks. The Montessori student will be sensitive to learning from the environment and have a desire for purposeful work. The mixed-age groupings will create older students who become leaders and learn with and from other students while the younger students experience modeling from the older students.

Every student is unique and so are the parents/guardians. The model Montessori parent/guardian will believe that students should be treated with dignity and respect, willing to model correct behavior, and desire an education for their child that is intriguing rather than traditionally structured and highly competitive.

While we recognize that there are students who will excel in this environment, we acknowledge that we will have a diverse student population, and it is MWMA's responsibility to provide the outstanding educational program contained in this charter to all students who enroll.

What distinguishes the MWMA target population is that the student and family want the Montessori experience. Parents and students that are familiar with the Montessori philosophy will be excited to have a public Montessori school available, and those families new to the Montessori philosophy will be attracted because of the multi-age grouping and innovative curriculum. The students and families who will choose a Montessori education will be parents that encourage independent learning and students that thrive in a student-centered learning environment. The target population are those students desiring a new approach to learning, searching for new ways to excel and be academically successful. The Montessori philosophy will meet this desire. As stated above, "Students in our area lack ready access to Montessori schools and Montessori learning materials, as there are very few Montessori schools in the

southern part of the Salt Lake Valley. All of the Montessori schools that are located in the area are private, and the tuition of these schools is prohibitively expensive for many of our prospective students. The adoption of the Utah Core Curricula, supported by current research, indicates a desire for greater inquiry focused educational strategies.”

MWMA will give parents in the South Jordan area an opportunity to have access to Montessori best practices. The target population is inclusive of all special populations described below and allows for parents to have a clear choice when enrolling their child in our Montessori program. In addition, the MWMA Governing Board of Directors understands and is committed to meeting the needs of all students enrolled at the school. Although the target population of independent learners will be attracted to the Montessori program, any student enrolled will benefit from the Montessori curriculum and approach to learning.

The Montessori classroom includes students working individually or in small collaborative groups through areas of specialized curriculum. Classrooms will encourage students to use these hands-on didactic materials to learn concepts, apply concepts, and experience concepts using a variety of sensory experiences. Teachers will present the materials to students at the appropriate stage of development, and the materials will be natural and self-correcting. For example, the curriculum will not be compartmentalized into separate subjects; instead it will be introduced simply and concretely and then reintroduced several times at increasing degrees of complexity. Teachers will arrange the materials according to the curriculum sequence, and students will have the freedom to work through the prescribed activities and materials allowing for uninterrupted concentration and unrestricted movement while learning order and sequence. This robust, prepared environment will be tailored to the students’ age group and allow the students to develop independence, understand order, and become aware of the harmony in their environment.

Our belief is that every student is unique and independent and should be permitted to develop and advance at his or her own pace. This is our target population: independent workers or those students willing and wanting to become independent workers. Dr. Maria Montessori focused on developing the whole student by moving away from the traditional adult-centered classroom to a methodology that will facilitate independent development and personal experience. “Our aim is not only to make the child understand, and still less to force him to memorize, but so to touch his imagination as to enthuse him to his innermost core,” as stated by Dr. Maria Montessori.

Special Populations

MWMA is committed to the belief that education is a means by which each student has the opportunity to reach his or her fullest potential; all students have a right to educational experiences that challenge their individual development whether it is below, at, or beyond the

level of their same-aged peers. In accordance with this philosophy, MWMA will provide educational programs that recognize and make provisions for the needs of ALL students. Mountain West Montessori Academy will be cognizant of the needs of special population students. The school will seek to enrich the lives of all students by facilitating a learning environment matched to each student's developmental needs.

Student identification within special populations, such as English Language Learners (ELL), 504, gifted and talented, special education, etc., will be accomplished through a variety of avenues including, but not limited to, those listed below:

- Registration: including home language survey, special education, and 504 identification questions
- Economically Disadvantaged Forms/ Free and Reduced Lunch Forms
- Child Find for Special Education
- Assessment Data (State required and curriculum based)
- Behavioral Data
- Teacher Observation
- Teacher generated student information survey

Students who are English Language Learners will receive appropriate interventions including, but not limited to:

- Small group instruction
- One on one tutoring
- The implementation of World Class Instructional Design and Assessment (WIDA) strategies
- Professional Development for teachers of ELL students
- More instructional time in literacy
- Peer mentors

Students deemed eligible for 504 accommodations will have a plan developed by a team including parents, the student (when appropriate), administration, teachers, and any other appropriate person such as a medical professional. The school will annually review all 504 plans.

MWMA will develop an annual gifted and talented plan (Accelerated Students Program) as well as an at-risk intervention plan (Enhancement for At-Risk Students) as outlined in the Utah Consolidated Application (UCA).

Students identified as Gifted and Talented will receive appropriate enhancement activities including, but not limited to:

- Multi-age grouping
- Differentiated curriculum

- Instructional strategies identified in the USOE Gifted and Talented handbook
- Jr. High honors/accelerated work
- Enrichment electives

Identifying struggling learners in any grade is the first step in helping them gain the academic and behavioral skills necessary to be lifelong learners. In meeting the needs of academically at-risk students, MWMA will use a preventive problem-solving multi-tiered systems of support (MTSS), frequently referred to as Response to Interventions (RtI). MTSS is a comprehensive system of differentiated supports that may include evidence based instruction, universal screening, progress monitoring, formative assessments, research based interventions matched to student needs, and educational decision-making using student outcomes. MWMA teachers and support staff will utilize assessment data; identify those students in need; isolate research-based interventions that are appropriate for targeted students. Interventions for at-risk students may include but not be limited to the following:

- One on one tutoring
- Small group instruction
- Differentiated curriculum
- Increased time with concrete materials for visualization of concepts
- Multi-age grouping
- Weekly monitoring of individual student work plan

Students with disabilities will have a current Individual Education Plan (IEP) and the school will follow all applicable laws (See **Section 17**).

Admission Procedures/Lottery Policy

All Mountain West Montessori Academy students will be enrolled based on a lottery system as established by USOE Administrative Rules for Charter Schools and Utah Code. Student enrollment will not be limited based on ethnicity, national origin, gender, religion, income level, creed, color, disabling condition, or proficiency in the English language. MWMA will follow state and federal law throughout its admission procedures. If the number of applications exceeds the capacity of a class, grade, or ultimate enrollment, a lottery system will be instituted, and students shall be selected through a random lottery in accordance with applicable law. Please see the school's proposed Enrollment and Lottery Policy contained in **Attachment A**.

MWMA intends to offer preferential enrollment to individuals who play a significant role in the start-up of the school as evidenced by a time commitment and/or specialized talent. Founding Members may be comprised of parents, educators, staff, businessmen, and community members as designated by the Governing Board of Directors and submitted to the State Charter School

staff prior to the opening day of school. The percentage of students eligible for Founding Member and staff preference will not exceed five percent (5%) of the ultimate enrollment.

Student enrollment is a top priority for the Founders of MWMA because of the need to create a unified community with a solid student enrollment base and a high retention rate. Outreach to notify the community about MWMA's admission and enrollment opportunities will take place through mediums such as the school's website, social networking, marketing materials, and open houses. For specific details on the student and parent outreach plan, please reference **Section 4: Market Analysis**.

Student Attendance and Enrollment

Mountain West Montessori Academy (MWMA) understands that high student attendance is crucial to a student's learning and development. MWMA will work to provide an engaging environment for students with clear attendance policies that describe the natural consequences of missing school. School administration and staff will track average daily attendance as well as excused and unexcused absences in order to encourage high school-wide attendance and individualized attendance.

The founders of MWMA believe in working with students and families before a student is identified as chronically absent. Corville-Smith (1998) found the following six variables were predictors of absenteeism: 1) Students' school perceptions; 2) Perception of parental discipline; 3) Parents' control; 4) Students' academic self-concept; 5) Perceived family conflict; and 6) Social competence in class.

Faculty and administration will strive to identify these risk factors and meet with students and families to serve their needs and improve attendance. By identifying issues that lead to poor attendance and addressing them with individual students and families MWMA will be able to meet their attendance goals and continue to improve. Parents/guardians are the student's main source of support for positive school attendance. MWMA staff will work with parents and guardians to find positive solutions while stressing the importance of school attendance through Parent Teacher Conferences, teacher email, and school reports.

Good attendance will be valued and rewarded in the classroom and school. Students will be motivated to attend class based on improvement and instructional incentives. The classrooms will be interesting and challenging, which will motivate students' participation and involvement. MWMA will focus on student learning, promote high student expectations, cultivate a rich learning environment, and maximize learning time to make academic life appealing and exciting to attend.

Mountain West Montessori Academy will work in combination with communities and families to monitor and promote attendance by identifying and addressing factors that can lead to chronic absences. Students must be present and engaged to learn, and the Governing Board has established the following goals for student attendance and enrollment after reviewing reports presented to the Utah State Charter Board for *Charter School Enrollment and Historical Data*, *Charter School Retention Rates*, *Charter School Student Transfer Report*, and *the Year-to-Year Reenrollment Report*. The below goals will be reviewed and revised annually by the Governing Board of Directors to certify that they are setting a high performance standard for the school community.

Indicator - Student attendance and reenrollment		
Measure	Metric	Board Goal
Student attendance rate	Percentage of students attending target number of days (all student attendance/all student membership)	93%
Within year enrollment rate	Percentage of students continuously enrolled throughout the year	90%
Year-to-year reenrollment rate	Percentage of students re-enrolled from one year to the next	85%
Continuous reenrollment rate	Percentage of students continuously enrolled for all available years	84%

Section 3

Calendar and Bell Schedule

Calendar

Mountain West Montessori Academy (MWMA) will follow a traditional calendar similar to the surrounding school district. School will be in session 180 days per school year, will accommodate all testing windows, and will utilize trimesters. However, MWMA may elect to use semesters if it is found to be more productive to the learning environment.

The following calendar is tentative for the 2014-2015 school year and incorporates trimesters as well as provides an example of what MWMA plans on implementing the first year.

MWMA School Calendar 2012-2013

Board Meetings are on the first Tuesday monthly.

Professional Development One Hour Early Release Days are on the first Friday monthly.

August

11-15 Professional Development
18 First Day of School

September

1 Labor Day – No School

October

13-15 Parent Teacher Conferences
15-17 Fall Break – No School

November

13 End of 1st Trimester
14 Teacher Comp. Day – No School
17 2nd Trimester Begins

December

22-31 Winter Break – No School

January

1-2 Winter Break – No School

February

9-11 Parent Teacher Conferences
12 Prof. Development – No School
13 Teacher Comp. Day – No School
16 Presidents Day – No School
27 End of 2nd Trimester

March

2 3rd Trimester Begins
30-31 Spring Break – No School

April

1-3 Spring Break – No School

May

25 Memorial Day – No School
26-28 Parent Teacher Conferences
29 Last Day of School

AUGUST 2014						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
					1	2
3	4	5 Board Meeting	6	7	8	9
10	11 Professional Development	12 Professional Development	13 Professional Development	14 Professional Development	15 Professional Development	16
17	18 First Day of School	19	20	21	22	23
24/31	25	26	27	28	29	30

SEPTEMBER 2014						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
	1 Labor Day	2 Board Meeting	3	4	5 Early Out - Professional Development	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

OCTOBER 2014						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
			1	2	3 Early Out - Professional Development	4
5	6	7 Board Meeting	8	9	10	11
12	13 Parent Teacher Conferences	14 Parent Teacher Conferences	15 Parent Teacher Conferences	16 Fall Break	17 Fall Break	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

NOVEMBER 2014						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
						1
2	3	4 Board Meeting	5	6	7 Early Out - Professional Development	8
9	10	11	12	13 No School - End of 1st Trimester	14 No School - Teacher Comp. Day	15
16	17 2nd Trimester Begins	18	19	20	21	22
23/30	24	25	26 Thanksgiving Break	27 Thanksgiving Break	28 Thanksgiving Break	29

DECEMBER 2014						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
	1	2 Board Meeting	3	4	5 Early Out - Professional Development	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22 Winter Break	23 Winter Break	24 Winter Break	25 Winter Break	26 Winter Break	27
28	29 Winter Break	30 Winter Break	31 Winter Break			

JANUARY 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
				1 Winter Break	2 Winter Break	3
4	5 *See Testing Window	6 Board Meeting	7	8	9 Early Out - Professional Development	10
11	12	13	14	15	16	17
18	19 MLK Day	20	21	22	23	24
25	26	27	28	29	30	31

FEBRUARY 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
1	2	3 Board Meeting	4	5	6 Early Out - Professional Development	7
8	9 Parent Teacher Conferences	10 Parent Teacher Conferences	11 Parent Teacher Conferences	12 Professional Development	13 No School - Teacher Comp. Day	14
15	16 Washington & Lincoln Day	17 *See Testing Window	18	19	20	21
22	23	24	25	26	27 End of 2nd Trimester	28

MARCH 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
1	2 3rd Trimester Begins	3 Board Meeting	4	5	6 Early Out - Professional Development	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30 Spring Break	31 Spring Break				

APRIL 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
			1 Spring Break	2 Spring Break	3 Spring Break	4
5	6	7 Board Meeting	8	9	10 Early Out - Professional Development	11
12	13 *See Testing Window	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

MAY 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
					1 Early Out - Professional Development	2
3	4	5 Board Meeting	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25 Memorial Day	26 Parent Teacher Conferences	27 Parent Teacher Conferences	28 Parent Teacher Conferences	29 Last Day of School	30

JUNE 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
	1	2 Board Meeting	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

JULY 2015						
Sun	Mon	Tues	Wed	Thur	Fri	Sat
			1	2	3	4
5	6	7 Board Meeting	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

 Term Start/End Dates
 Student Holidays
 Parent Teacher Conferences
 One Hour Early Out for Professional Development
 Teachers Only for Professional Development
 No School - Teacher Compensation Day
 Board of Directors Meetings

Test	Grades	Window of Administration
Benchmark Reading	1, 2, 3	January
English Language Proficiency for ELL Students	K-9	January through May
DWA	5, 8	Fourteen weeks prior to the last Monday of the school year
CRT	3-9	Six weeks prior to the last Monday of the school year

Trimesters:	1st: 61 Days	2nd: 60 Days	3rd: 59 Days
--------------------	--------------	--------------	--------------



Bell Schedule

Mountain West Montessori Academy (MWMA) may apply the below bell schedules for the Elementary and Junior High. The schedule below reflects an uninterrupted three-hour work cycle that constitutes an integral part of the Montessori method. Emphasis is placed upon students' opportunity to build up the ability to focus on their work; student concentration is respected. Kindergarteners are involved in active learning throughout the three-hour school day, which may include teacher-directed outside activities, dance, drama, etc. Elementary students are given the independence to choose when they will take a break in an appropriate manner. Supervised time outside occurs in conjunction with lunch, and oftentimes teachers will eat with students and provide structured outdoor learning activities in the afternoon.

Daily Schedule

AM Kindergarten	
8:25 AM	Warning Bell
8:30-11:30 AM	Class/IT
11:30 AM	Dismissal
PM Kindergarten	
12:25 PM	Warning Bell
12:30-3:30 PM	Class/IT
3:30 PM	Dismissal

Elementary	
8:25 AM	Warning Bell
8:30-11:15 AM	Class/IT (Grades 1-3)
11:15-11:45 AM	Lunch (Grades 1-3)
11:45-3:30 PM	Class/IT (Grades 1-3)
8:30-11:45 AM	Class/IT (Grades 4-6)
11:45-12:15 PM	Lunch (Grades 4-6)
12:15-3:30 PM	Class/IT (Grades 4-6)
3:30 PM	Dismissal

Junior High	
8:25 AM	Warning Bell
8:30-9:35 AM	1st Period/IT
9:35-9:40 AM	Passing Time
9:40-10:30 AM	2nd Period/IT
10:30-10:35 AM	Passing Time
10:35-11:25 AM	3rd Period/IT
11:25-11:30 AM	Passing Time
11:30-12:20 PM	4th Period/IT

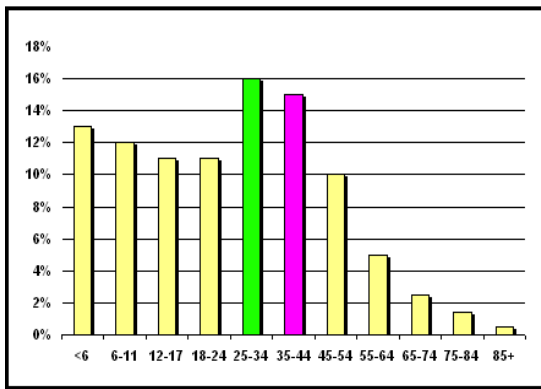
12:20-12:50 PM	Lunch
12:50-1:40 PM	5th Period/IT
1:40-1:45 PM	Passing Time
1:45-2:35 PM	6th Period/IT
2:35-2:40 PM	Passing Time
2:40-3:30 PM	7th Period/IT

*IT = Instructional Time

Section 4
Market Analysis

Community Information and Location

Community Information. The Governing Board of Directors intends to locate Mountain West Montessori Academy (MWMA) within the city of South Jordan. We selected South Jordan based on several considerations in addition to the fact that it is our own community. Our preliminary focus was program viability and marketability. We understand that in order to implement our vision, we must: (i) be able to market our school effectively; (ii) have a stable



Data provided by the City of South Jordan
<http://www.sjc.utah.gov/demographics.asp>

student enrollment; and (iii) maintain a strong financial position to provide our faculty with the resources necessary to carry out the mission and vision of MWMA. South Jordan is not only our community, but it has ideal demographics to satisfy the considerations listed above.

South Jordan is one of the largest cities in Utah reporting an estimated 53,902 residents as of January 1, 2012. Of its 53,902 residents, the table to the left illustrates that roughly 25% are under the age of eleven. Within a three-mile radius of our

target area, there are ten elementary schools and three middle schools located in the cities of South Jordan (eight schools), Riverton (four schools), and Sandy (one school) (see Map & Table below). According to the Superintendent’s Annual Report (2010-2011) *Fall Enrollment by School, District, Grade, Gender, & Ethnicity*, these ten elementary schools served 8,790 students in grades K-6, and the three middle schools served 4,170 students in grades 7-9 for a K-9 enrollment totaling 12,960 students.

In our efforts to understand Jordan School District’s future plans to construct new facilities in the area, we were not given specific information from the district other than the following: (i) the district is aware of the rapid growth in school-aged children in our target area (as well as its neighboring cities); and (ii) the district does not have a capital facility bond for vote on new construction in November 2012, but will likely present an initiative bond in November 2013 for future construction. This provides MWMA with a wonderful opportunity to work with the district to relieve enrollment pressure and free up district capital to invest in other areas within its boundaries.

In addition to the large enrollment numbers of the surrounding schools, the city of South Jordan anticipates continued growth. As noted in the Table above, young families represent the highest

percentage of residents in our community, and it is reasonable to expect that the city's average of 3.9 individuals per household will remain constant or increase, and the overall population of school-aged children will remain robust.

By itself, the data above indicates that student numbers exist and are strong. The remainder of the analysis must focus on what MWMA will bring to our community and why families will choose to attend this program.

South Jordan is also home to Early Light Academy, a K-9 charter school located along the city's southern border with Herriman. Early Light Academy reported an October 2011 fall enrollment of 751 students, with over 1,500 students on its 2011-2012 waitlist. While strong enrollment/waitlist numbers for Early Light Academy do not necessarily correlate with interest in attending a different charter school, we believe it reflects positively on our community's interest in choice and willingness to explore alternative educational options. This assertion is further supported by the fact that Early Light Academy's records indicate it received over 2,600 applications *prior* to its first day of instruction. It is the Governing Board of Directors belief that this desire for public education options will greatly enhance our ability to effectively inform our community of MWMA's offering and attract families to our school.

As the Governing Board of Directors, we are confident that the data above demonstrates that student numbers exist and are strong within our target area. Furthermore, we are confident that families in our target area will find MWMA to be an attractive option. With over 2,000 private tuition-based Montessori schools throughout the United States, the popularity of the Montessori approach continues to appeal to parents (Note: because there is no single Montessori registry, there is some dispute regarding the actual number of Montessori schools in the United States; some estimates exceed 4,000). This popularity has made its way into the charter school community as well. In the 2010-2011 Superintendent's Annual Report, it was reported that 1,480 students attended one of the three Montessori charter schools operating in the state. The most recently authorized/approved Montessori charter school is Maria Montessori Academy in North Ogden. The MWMA Governing Board of Directors has met with Maria Montessori Academy's Director on several occasions, toured the facility, and observed regular school day activities. In support of our belief that MWMA's target area not only sustains a robust student population, but will also find our school to be an attractive option, we examined Maria Montessori Academy as a demographic case study – a summary of this case study follows:

Maria Montessori Academy was authorized to open in the fall of 2010 with 450 students in grades K-6. The school was approved to locate its facility in North Ogden, and the Board selected a location within the city at 2505 North 200 East. North Ogden is located within Weber School District and according to 2010 census data, it has a population of 17,357 residents. There were seven elementary schools located within a three-mile radius

of the new school. These seven elementary schools reported an Oct 1, 2010 K-6 enrollment of 4,537 students.

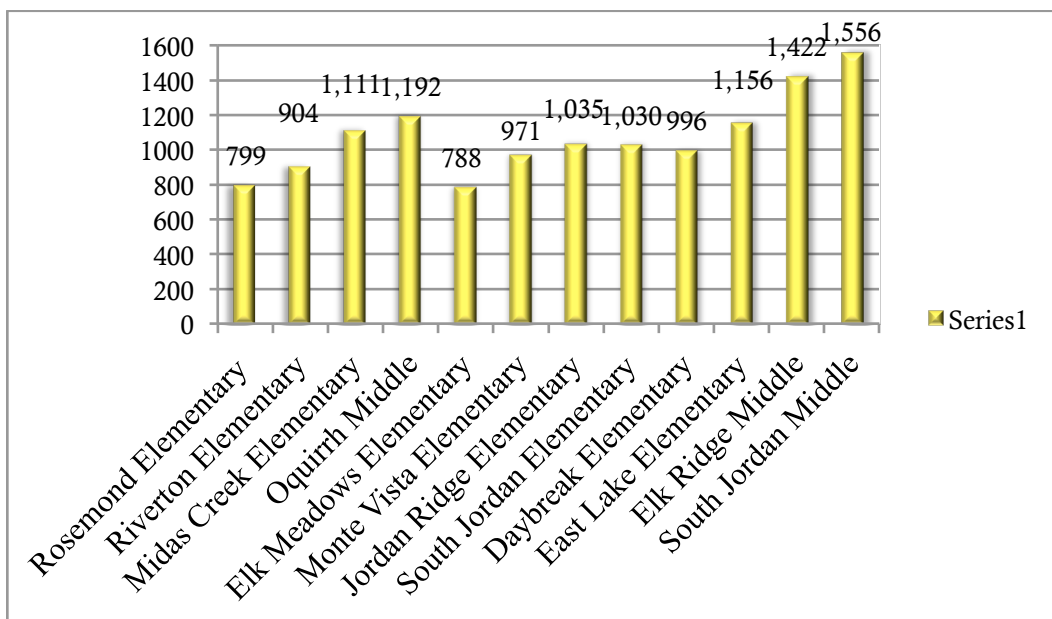
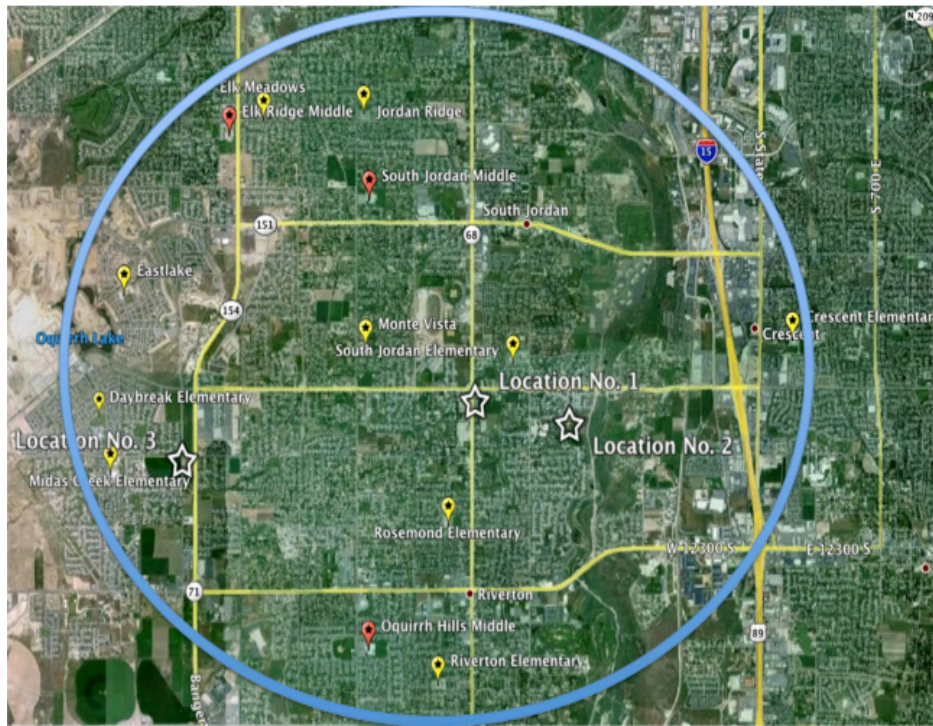
Despite the fact that there was a strong student-aged population in the area, the overwhelming majority of residents had little or no experience with Montessori. In the fall of 2009, the Board of Maria Montessori Academy and its marketing committee began to focus their outreach efforts on informing the community about the Montessori method. They held public cottage meetings geared toward educating the community on what a Montessori education would offer their children, the opportunities available at this new school, and how charter schools worked. Feedback from cottage meetings was very positive, and attendance continued to grow. By the time the school opened its doors in August 2010, it had reached its capacity in all grades and maintained a healthy wait-list. The school has continued to maintain its enrollment at capacity with a wait-list since opening.

Following its opening, the Board of Maria Montessori Academy has conducted annual parent satisfaction surveys. Just like any other new charter school, Maria Montessori Academy faced challenges during its start-up; however, these survey results demonstrated that parent satisfaction with the school was high. Not only has this school fostered a strong relationship with its parents, but they have worked diligently to contribute to their community, for example: the school worked jointly with North Ogden city officials to sponsor a 5k benefit run, and it hosts an annual “Gratitude Feast” where all city workers, police, fire, emergency responders, and local community leaders are invited and attend a luncheon on their behalf at the school – an event that enjoys very high attendance. In short, adherence to the Montessori philosophy of both education and community has resulted in positive experiences for parents and area residents.

Much like Maria Montessori Academy’s situation, MWMA will be located in a community with a solid foundation of school-aged children. In fact, the target population residing within a 3-mile radius of MWMA’s proposed location is almost twice as large (North Ogden: 4,537 K-6 students vs. South Jordan: 8,790 K-6 students); despite the larger surrounding population, MWMA’s first year enrollment capacity is only 24 students higher than Maria Montessori Academy’s first year enrollment. Like Maria Montessori Academy’s target population, the vast majority of the population residing in our target area will have little experience with the Montessori method; therefore, we intend to follow a similar marketing plan with the content focused on educating parents about the Montessori program, and we have witnessed the attractiveness of this approach in our discussions with members of our community as well as Maria Montessori Academy’s history. Like Maria Montessori Academy’s community involvement, MWMA’s adherence to the Montessori philosophy will promote positive contributions within our community as well.

In short, MWMA’s target area/population is rich with opportunity, our community has already demonstrated its desire to seek “choice’ in public education, our marketing plan is based on strategies that have proven to be effective, and the Montessori method encourages schools to add value to their communities which provides for increased positive exposure and sustainability.

Educational Landscape



Site Selection. After selecting the target area, we began the process of reviewing potential sites. We acknowledge that many, if not all, of the listed locations will be unavailable in the future; however, we intend to utilize the same selection approach and criteria at that time. As a charter school, we believe we can be flexible and creative about the type of space we occupy (commercial, industrial, renovation/remodel, new construction, temporary facilities) and the financial terms of occupancy (lease vs. purchase). Our analysis started with a review of listed properties (residential, commercial, and industrial).

Because South Jordan is our target market area, our search focused within the city's boundaries. Additionally, part of the MWMA mission is involvement in the community; therefore, we felt it was important that the location lends itself to active community involvement. Other factors we considered were price, safety, accessibility, sufficient acreage to support physical activities or proximity to public parks, availability of parking, traffic concerns, availability and proximity to public utilities (water, sewer, electricity, gas), renovation expenses and restrictions, and layout of the site.

There are few "industrial" or "commercial" buildings available for sale in South Jordan that would meet the needs of the school. In fact, there were no industrial properties, and the available commercial properties were too limited in size or access to be viable candidates. However, there are several future developments scheduled to begin construction in 2012 that offer lease options. For example, the image to the right depicts a single 50,000 square foot building that is currently being advertised. This building is one of three similar facilities that will comprise 150,000 square feet of leased office space. One option would be to lease buildings within this development or a similar development that can sustain the square footage needed at MWMA. However, at \$17.50 per square foot (not including the necessary design changes, improvements and expenses), the school would be much better served to find an existing commercial building with a substantially lower lease rate or engage a developer to design and develop a new school facility at a lower lease rate per square foot. While there are many additional considerations/expenses related to modifying an existing facility to meet MWMA's needs, the current commercial/industrial market does not include a viable lease or purchase option. However, the next 12-18 months will certainly see new facilities on the market, and we will be monitoring new arrivals.



Lease Option: 50,000 SF \$17.50/SF, NNN

Our next step was to review unimproved land listings in our community. Our search focused on parcels ranging from 4-10 acres and resulted in several properties. In addition to looking at advertised properties, our search also included discussions with city officials and local developers or landowners. There are three properties that we consider to be the best options.

These options are ranked and described below in their order of preference beginning with our first pick.

Ranked #1		
GENERAL INFO: Location - Near 11400 S & Redwood; Size: 20+ subdividable acres (provides opportunity to specify exact acreage and site layout). Price \$85-\$100k/acre).		
Criteria	1-4 Stars	NOTES
Promotes Community Involvement	★★★★	Within 1.5 miles of community museum, municipal buildings, equestrian park, and retirement homes
Price	★★	Would be ranked higher if it were an "advertised" price.
Site Safety	★★	While set back from Redwood, it is still close to this major road. Site layout will reduce any potential safety concerns
Accessibility	★★★★	Very accessible via 11400 S. and via Redwood Rd.
Size	★★★★	Subdividable - able to tailor to meet needs.
Traffic/Parking/Entrance-Exit	★★★	Close to Redwood, so may require some offsites development expense to cover pulloff Redwood - TBD by city. However, will meet traffic needs.
Access to Utilities	★★	2 stars because we may select a portion of the property that is further setback from Redwood. While this would ease safety and some traffic concerns, it would increase the expense needed to bring public utilities to the building. This will be determined based on price and city requirements.
Renovations/Offsite Improvements	n/a	Full development - no offsites readily apparent, TBD by city staff after review of site and building plans.
Site Layout	★★★	Can be tailored to fit needs.
Other Restrictions	n/a	None at this time

Ranked #2		
GENERAL INFO: Location - Near 11630 South 975 West; Size: 22.5 subdividable acres (provides opportunity to specify exact acreage and site layout). Price \$1.92M (\$85k/acre for full property)		
Criteria	1-4 Stars	NOTES
Promotes Community Involvement	★★★	Within 3-4 miles of community museum, municipal buildings, equestrian park, and retirement homes.
Price	★★	Would be ranked higher if it were advertised on a cost/acre basis. This property lists all 22 acres for sale - even though seller would be willing to sell subdivided portion, it would be more "solid" if it were advertised that way.
Site Safety	★★★	Not close to major roads, but relatively close to Jordan River - Site plan would need take steps to eliminate safety concerns (larger fencing, selection of appropriate parcel within the 22 acres, etc.).
Accessibility	★★	Would require some increased neighborhood traffic, and this location would not provide same visibility as #1.
Size	★★★★	Subdividable - able to tailor to meet needs.
Traffic/Parking/Entrance-Exit	★★	While distance from major roads would be a bonus, this location would require additional neighborhood traffic. While this is ideal for student safety, some neighborhood residents would probably be upset. This would require a careful approach with both neighbors and the city to promote a good neighbor relationship.
Access to Utilities	★★	2 stars because we may select a portion of the property that is further setback from stubbed utilities on location. Ultimately, this will be determined based on cost and city requirements.
Renovations/Offsite Improvements	n/a	Full development - no offsites readily apparent, TBD by city staff after review of site and building plans.
Site Layout	★★★	Can be tailored to fit needs.
Other Restrictions	n/a	None at this time

Ranked #3		
GENERAL INFO: Location - near 11800 S 4000 W; Size: 5 acres + additional 4-acre parcel (contiguous);		
Criteria	1-4 Stars	NOTES
Promotes Community Involvement	★	Far away from municipal hub of city, more of a new commercial and residential area.
Price	★	Listed at \$103k/acre is very reasonable. However, the offsite improvements would be much more extensive, and when considering that it would likely increase cost to roughly \$173k/acre to put its developability on par with properties #1 and #2, this location scores lower.
Site Safety	★★★★	Site is well situated for student safety - good balance
Accessibility	★★★	Good accessibility via 11800 S. or 4000 W.
Size	★	Would either purchase 5 acres (relatively small, or combine it and purchase the extra 4 acres - a little large. Taking into consideration the already increased cost for offsite improvements, makes this option a less attractive.
Traffic/Parking/Entrance-Exit	★★	If we purchased the 5 acres, it would make it a little tight, but definitely realistic. If we purchased the full 9 acres, it would provide ample space to accommodate traffic and parking.
Access to Utilities	★	Road, gas, water and power not onsite. Bringing utilities onsite would require additional cost of upwards of \$350k for a projected 1,000 ft two-lane roadway cross section at \$350 per linear foot.
Renovations/Offsite Improvements	n/a	Addressed in section above.
Site Layout	★★	Good layout, but no ability to tailor to needs.
Other Restrictions	n/a	None at this time

Location No. 1 (Ranked 1st) and **Location No. 2 (Ranked 2nd)** consist of two separate but very similar properties located along the 11400 South corridor in South Jordan (*see*, Educational Landscape Map above).

Location No. 1 - The property that ranked as our #1 location is not actively listed, but we have talked with the owner on multiple occasions, and he indicates he would be willing to entertain an offer for the school. **Location No. 1** is located near the crossroads of 11400 South and Redwood Road. The property consists of 20+ acres of land, and the owner indicated he could subdivide and sell a small tract (roughly 7 acres). Because we could not commit to a price, we discussed the general terms and average market values based on similarly situated properties. The property would require some offsite improvements, but nothing out of the ordinary like Location No. 3. The most attractive features of **Location No.1** are its accessibility, visibility, and opportunities for nearby community involvement – all of which are much better than average.

There are three district elementary schools within 1.5 miles of Location No. 1 (Rosemond Elementary [1 mile], South Jordan Elementary [1 mile], and Monte Vista Elementary [1.5 miles]). These schools reported a combined fall 2011 enrollment of 2,795 K-6 students. According to the *2011 UPASS Additional Information Report*, this combined enrollment is broken down as follows: AfAm/Black (28 students or 1%), American Indian (7 students or .25%), Asian (35 students or 1.3%), Hispanic/Latino (142 students or 5.1%), Pacific Islander (32 students or 1.1%), and White (2,461 or 88.1%) (Not declared in report: 90 students or 3.2%). Of the students that attended these schools, 493 students (18%) qualified under Socio-Economic

Status, 377 students (13%) qualified as Students with Disabilities, and 51 students (2%) qualified as English Language Learners.

Location No. 2 ranked 2nd and is located in South Jordan near its boundary with Draper and



Riverton (11630 South 975 West). The property is zoned residential and consists of 22.54 acres. Price: the property is listed at \$1,922,662 or \$85,300/acre. On a cost per acre basis, this is the lowest price we have encountered. However, the school's goal is to be situated on approximately 5-7 acres. We have discussed our situation with the owner's representative, and he indicated the seller would be willing to consider selling a portion of the property at a slightly higher price per acre. Based on the cost of

the land (even at an increased cost per acre), proximity to neighborhoods, general community amenities and accessibility, **Location No. 2** comes in a close second place.

There are two district elementary schools within 1.5 miles of Location No. 2 (Rosamond Elementary [1.5 miles] and South Jordan Elementary [<1 mile]). These schools reported a combined fall 2011 enrollment of 1,868 K-6 students. According to the *2011 UPASS Additional Information Report*, this combined enrollment is broken down as follows: AfAm/Black (22 students or 1.1%), American Indian (5 students or .27%), Asian (25 students or 1.3%), Hispanic/Latino (100 students or 5.4%), Pacific Islander (19 students or 1%), and White (1,635 or 87.5%) (Not declared in report: 62 students or 3.3%). Of the students that attended these schools, 373 students (20%) qualified under Socio-Economic Status, 230 students (12%) qualified as Students with Disabilities, and 32 students (2%) qualified as English Language Learners.

Location No. 3 ranked 3rd and is located near 11800 South and 4000 West. The property is



zoned residential and consists of five acres of unimproved land and provides the possibility of obtaining an additional four contiguous acres. Price: the five-acre parcel is listed at \$515,000 or \$103,000/acre. From a purchase price standpoint, this is a very attractive option. However, road, gas, water, and power are not onsite, and bringing them to the site would dramatically increase the cost of development. Taking this into consideration, we believe it would be reasonable to project an additional cost of \$350,000

(1,000 ft. average two-lane roadway cross section at \$350 per linear foot). This would include road improvements and all associated utilities. In light of these additional offsite improvements,

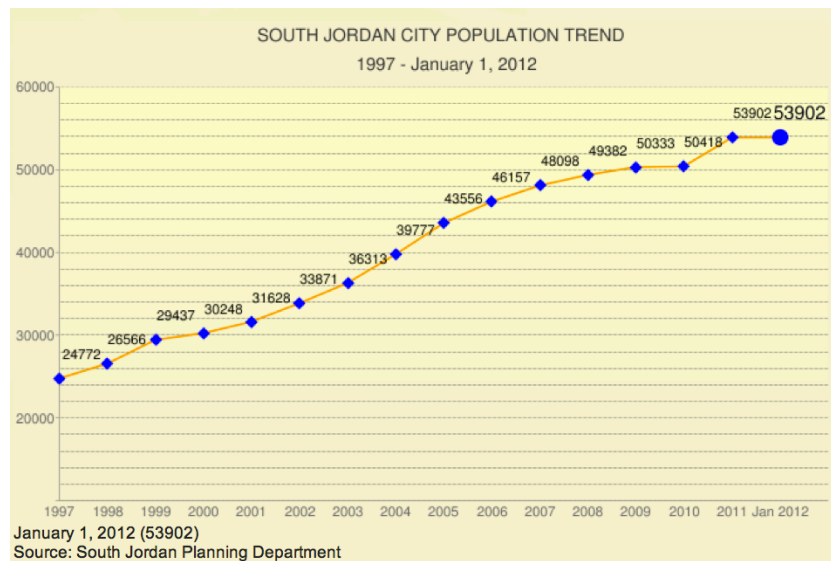
it would be more accurate to say the cost is \$865,000 or \$173,000/acre when comparing it to the other options with road/utilities onsite.

There are three district elementary schools within 1.5 miles of Location No. 3 (Daybreak Elementary [<1 mile], Midas Creek Elementary [.5 mile], and Eastlake Elementary [1.5 miles]). These schools reported a combined fall 2011 enrollment of 3,263 K-6 students. According to the *2011 UPASS Additional Information Report*, this combined enrollment is broken down as follows: AfAm/Black (19 students or 1%), American Indian (11 students or .3%), Asian (43 students or 1.3%), Hispanic/Latino (216 students or 6.6%), Pacific Islander (31 students or 1.1%), and White (2,540 or 78.8%) (Not declared in report: 403 students or 12%). Of the students that attended these schools, 497 students (15%) qualified under Socio-Economic Status, 307 students (9%) qualified as Students with Disabilities, and 93 students (3%) qualified as English Language Learners.

For specific details on facility assessment, needs, etc., please reference **Section 5: Capital Facility Plan**.

Market Context and Trends

District Data. Jordan School District was established in 1905 and is comprised of urban, suburban, and rural areas encompassing the cities of South Jordan, Bluffdale, Copperton, Herriman, Riverton, and West Jordan, as well as surrounding unincorporated areas of Salt Lake County. On July 1, 2009, the district divided into two school districts: Jordan School District and Canyons School District. The State of Utah has 41 school districts with Jordan being the fourth largest. Approximately 50,000 students are enrolled in the district. For the 2011-12 school year, the district reported 53 schools under its governance and utilized 229 portable classrooms to assist with overcrowding.



Jordan School District - Schools & Students	
33 Elementary Schools*	28,384 students
9 Middle Schools	11208 students
8 High & Technical Schools	10,787 students
3 Special Schools	369 students
53 Total Schools	50,722 students
*19 elementary schools operate on year-round calendars	

Information provided courtesy of Jordan School District
<http://www.jordandistrict.org/resources/publications/statistics/>

As noted above, MWMA intends to locate its facility in South Jordan, which is part of Jordan School District. South Jordan city is still one of the fastest growing cities in the State of Utah. Since 1960, the population has grown from 1,345 to 53,902 (January 1, 2012). South Jordan had the 2nd highest annual average growth rate from 1990 to 1999 in the State of Utah with 9.4%. The city is one of the largest cities in the State of Utah and has been since 2000, and is the second largest city in Jordan School District. According to 2010 U.S. Census data, the 12,435 households in South Jordan reported a Median Household Income for 2006-2010 of \$91,199, with 2.7% of its population living below poverty level.

Prior to the downturn in the real estate market, the city was issuing upwards of 1,100 residential building permits per year. Over the past three years, the city has issued an average of 540 residential building permits each year. While the average number of building permits indicates a slowdown in new home construction, South Jordan issued 640 residential permits in 2011, which is more than the combined total of Jordan School District's other four major cities (Bluffdale City – 38 residential permits, Riverton – 160 residential building permits, West Jordan 142 – residential permits, Herriman – 246 residential permits). Based on this and other data, city planners predict residential growth will only continue for the next 20 to 25 years at which point the city will reach its projected capacity of 85,000-90,000 residents.

Growth in this area of Salt Lake County is fueled by the availability of land, a community lifestyle based on open space, large lots, a rural atmosphere, and a general population increase in the Salt Lake Valley; these same elements create a community environment that is well-suited for the introduction of MWMA.

According to US Census data, 91.5% of residents in the target area are White, 0.7% Black, 0.2% American Indian, 2.6% Asian, 0.9% Pacific Islander, 6% Hispanic/Latino, and 2.4% reporting two or more races. For the most part, these demographics resemble those reported by the schools analyzed above. In addition to this information, of the 12,960 students attending area schools, roughly 18.4% qualify under Socio-Economic Status and roughly 12% are classified as Students with Disabilities.

Competitive Advantage

The Montessori program delivered by Mountain West Montessori Academy (MWMA) will provide many advantages over traditional programs in our target area especially for families looking for a new choice in public education. In citing the 2000 US Census, the city reports that 95.8% of its population, 25 years and older, has a high school diploma or some college experience. Of the 95.8%, the same data reflects that 30.9% have a bachelor's degree or higher. With this in mind, it is easy to understand why the city advertises its citizens as "highly educated," a demographic that correspondingly has experience with and/or places a high priority on education.

Regarding the competitive advantages, MWMA will adhere to a traditional calendar, and classrooms will consist of approximately 25 students taught by a certified staff member and, to the extent it is financially feasible, a trained paraprofessional. This creates an appealing staff-to-student ratio and supports the individualized and student-centered experience that is part of our program. The traditional calendar is also an appealing option for many parents in our community. In an effort to address growth within the district, six of the seven elementary schools in South Jordan have moved to a year-round schedule, which is generally less appealing and more disruptive to family schedules. As discussed above, growth patterns in the South Jordan area predict that Jordan School District will need to continue to address ways to accommodate growth.

Another advantage to our program is the use of many hands-on learning materials in our classrooms to help students readily understand and apply concepts – an approach that has found favor among researchers and interested parents alike. The Montessori focus on choice, uninterrupted concentration, and independence increases self-directed learning skills in students; these desirable skills provide another compelling reason for parents to choose MWMA for their children.

MWMA will also model and cultivate social skills and behaviors that will appeal to parents in our community. A Montessori education actively promotes these characteristics in several ways: (1) Mixed-age classrooms provide opportunities for mentoring and leadership. Additionally, mixed-age classrooms have been shown to have a significant positive effect on children's pro-social behavior; (2) Montessori teachers model and promote grace, courtesy, and respect for others, and employ conflict resolution training in the classroom; and (3) Montessori philosophy advocates respectful rather than punitive discipline, and asserts that a peaceful and safe classroom is every student's right.

Perhaps one of the most obvious features of MWMA is that it will be a "public" Montessori charter school. With over 2,000 private tuition-based Montessori schools throughout the United States, the popularity of the Montessori approach continues to appeal to parents and increase in

popularity – and with the dense target population in our community, it is left up to MWMA’s Governing Board of Directors to effectively educate our community about this new option. As noted in the *Community Information* section above, we are fortunate to be targeting an area which has shown indications of a willingness to seek choice in public education (as seen in the popularity of Early Light Academy), and we will be implementing a marketing plan based on strategies that have proven to be effective for other Montessori charter schools. In conclusion, we are confident in our program, in our community, and in our plan.

Outreach/Marketing Plan

The Founders of MWMA believe in the reality that the success of the school will hinge on its ability to attract and retain students. Marketing/outreach efforts are essential in notifying potential MWMA families of the opportunity to enroll at the school.

According to the Colorado League of Charter Schools, Jefferson County, population 538,000 (Jordan School District has a population of 414,000) has fourteen charter schools, of which four are Montessori schools. Golden Colorado is a small town (population 39,258 with 15% of population between ages of 0 & 11 years) and is able to support two Montessori charter schools. One could compare Golden Colorado with South Jordan (population 55,557 with 24% of population between ages of 0 & 11), noting that Montessori education seems to be a popular choice in public charter schools, in our neighboring state.

We believe our Governing Board of Directors possesses unique experience that will assist in the implementation and delivery of a marketing plan that effectively notifies parents of the opportunity to enroll at MWMA and provides realistic expectations of its academic program.

As noted in **Section 8 – Organizational Structure & Governing Body**, Steve Barnes earned his B.A. in Mass Communications from the University of Utah and completed a successful City Council campaign in South Jordan last year. Similarly, Dan Galli also has experience in running a local election campaign within our city. These experiences provide Steve and Dan with unique insights into local demographics, marketing strategies, and public speaking, as well as demonstrate their commitment to public service. Rusty Bentley brings additional marketing expertise to the Governing Board of Directors. Rusty has been employed as the Vice President of Marketing and Operations at TriQuest (the fundraising division of Access Development) and has worked as a Senior Sales Analyst and a New Product Sales Manager. Rusty’s experience provides the Governing Board of Directors with a unique ability to obtain and digest detailed information as it relates to marketing our school in the community. Angie Johnson and Linda Hume complete the marketing picture by bringing a deep understanding of the Montessori program as a certified Montessori teacher and a parent of Montessori students respectively. As a whole, the Governing Board of Directors is positioned to implement an effective plan and provide prospective families with an accurate picture of MWMA’s program.

The purpose of our marketing plan is to provide potential MWMA families with a meaningful opportunity to participate in the enrollment process at the school. This means our marketing will inform the community of enrollment opportunities and educate families on our program and its benefits. Marketing materials will include advertising in English and Spanish and will specify that the school is a public school open to all families. This advertising will be distributed throughout the area. Not only will we market within our community, but we intend to utilize our community's resources and sponsored events to market our program; this approach involves our active participation and advertising in many city-sponsored events, such as the City Daddy Daughter Dance, the South Jordan Easter Egg & Candy Scramble, the Miss South Jordan Pageant, Country Fest, the Annual Chili Cook-off, and the Sights & Sounds of Summer activities.

Following is a sample outline of the forms and materials we may use to market MWMA:

- **Social Networking**
 - School Website
 - Facebook (page and ads)
 - Twitter
 - Blogger
 - Google AdWords/SEO
 - Email

- **Active Marketing Materials** (for use at Open Houses, Cottage Meetings, Community Sponsored Events, Door-to-Door Campaigns, etc.)
 - Brochures
 - Flyers (Quarter flyers and pass-along cards)
 - Enrollment Packets
 - Pass Along Cards

- **Passive Marketing Materials**
 - Site Sign at School Location
 - Yard Signs
 - City Newsletter
 - Direct Mail (quarter flyers or brochures)
 - Movie Theater Ads (Megaplex at the District)
 - Newspaper Advertisement
 - Email Campaign

- **School-Related Events/Meetings**
 - Regularly Scheduled Cottage Meetings
 - Open Houses/Meet & Greet
 - Ground Breaking
 - Ribbon Cutting

- **Community-Related Events**
 - Daddy Daughter Dance
 - Easter Egg & Candy Scramble
 - Miss South Jordan
 - Country Fest
 - Chili Cook-Off
 - Sights & Sounds of Summer

- **Community Advertisers**
 - Library
 - Doctor/Dentist Offices
 - Dance, Gymnastics, Karate Studios
 - Chamber of Commerce

Following our charter approval, we will post notices of public Board Meetings on the school's website as well as on the Utah Public Meeting Notice website as required by the Utah Open Meetings Act.

Section 5
Capital Facility Plan

Building

The Founding Board Members of Mountain West Montessori Academy (MWMA) place a high value on the importance of prudent and realistic planning as it relates to the school’s facility. As part of our facility planning, we have visited public and private Montessori schools and other charter schools, as well as reviewed floor plans for schools throughout the state. We believe this research has provided us with an understanding of the options regarding key features, necessary amenities, and other “extras” that might be available for MWMA. The table below lists the key components of an ideal MWMA facility:

SQUARE FOOTAGE 38,450 sq ft (72 sq ft/student)		
Features	No.	Notes
Regular Instruction Classrooms		
Kindergarten	1	
Grades 1-6	12	2 general classrooms/grade
Grades 7-9	6	2 general classrooms/grade
Special Education Classrooms	1	
Science Lab	1	Gas and water available
Music/Art Room	1	Use will vary
History	1	Use will vary
Computer/Electronic Device Storage	1	
Multipurpose Room/Gymnasium	1	
Library/Media Center	1	
Administrative Offices		
Principal	1	
Admin Support	1	
Nurse	1	
Counselor	1	
Reception	1	
Common Areas for Group Work		Key Montessori Feature
Lower Elementary	1	Include small kitchen, tile area & kiva (optional)
Upper Elementary	1	Include small kitchen, tile area & kiva (optional)
Middle	1	Include small kitchen, tile area & kiva (optional)
Data/Electrical Room	1	
Warming Kitchen (optional)	1	TBD
Restroom Banks	3	
Faculty Workroom	1	
Faculty Breakroom	1	
Storage Rooms		Size and number will vary with floorplan design
Janitor Closet	1	

As discussed in **Section 4 Market Analysis**, our search for viable commercial or industrial facility options yielded very few possibilities. For that reason, we determined our best approach would be to secure a site and construct a new building to meet our needs. Our review of local charter school facilities indicates that the features listed above are generally necessary, and it is feasible to include them in a 38,450 sq ft building. A building of this size would fall within our target square foot range of 68-75 sq ft/student (note: 38,450 sq ft. equates to 72 sq ft/student). By defining the building's footprint in the beginning, we are able to use that square footage as a measuring standard as we consider the facility's features such as classrooms (number and size), storage space, administrative office space, etc. In addition, establishing our general building square footage gives us direction as it relates to finding a suitable location and projecting final costs.

In **Section 4 Market Analysis**, we indicated that our land search focused on properties ranging from 4-10 acres, and we identified three potential locations that fall within this range (or can be subdivided to meet our needs). Our search included advertised properties and discussions with city officials, developers and landowners. Although all of these properties are viable options, we expect they may be unavailable in the future. Regardless of future availability, we feel that **Location No. 1** would make the best location for our facility in the current market. There are several factors supporting our decision: (1) the location is in close proximity to the new 11400 South I-15 interchange. This increases both accessibility for families and visibility within our community; (2) City utilities (water, power, sewer, gas) are at or near the property depending on the subdivided parcel – a fact that significantly reduces offsite improvement expenses; (3) the school would be located far enough from Redwood Road that there would not be safety concerns, but close enough to avoid excessive neighborhood traffic; (4) the current site layout will require relatively little improvement to achieve proper elevation/grade; and (5) there is ample space to accommodate the building, parking, traffic, and playground areas. We are encouraged by the fact that **Location No. 2** is similarly attractive, and would provide a strong backup plan. Notwithstanding the attractiveness of these options, we understand that the real estate market is constantly changing, and we will continue to monitor new commercial listings and land listings in search of a better alternative.

Contingency Plan

Our plan is to open school in fall 2014 in a new building, but we understand it is important to anticipate the potential need for short-term solutions to unforeseen delays in the facility acquisition process. It is an unfortunate reality that the real estate market and large-scale construction projects are unpredictable, and this makes MWMA's contingency plan a vital component to our overall Capital Facility Plan.

As discussed in the *Financing* section below, the Governing Board of Directors anticipates leasing a new facility for the first few years of operation. One of the benefits of a lease structure is the ability to shift (or at least share) the risk of unforeseen delays in construction or the city permitting process. This can be accomplished by engaging an experienced real estate attorney to assist in the lease negotiation process, and more specifically, in negotiating provisions for remedies in the event deadlines are not met.

For purposes of ensuring the building is under construction no later than January 1, 2014 (as required by *Utah Admin Code R277-482-5(C)*) and the school building is ready for students prior to the first day of school, the Governing Board of Directors will work closely with its attorney to ensure the remedies contemplated in this section are included in the lease agreement. The Governing Board of Directors will charge its attorney with the task of negotiating appropriate provisions that will establish deadlines and penalties for failure to perform under the agreement. Due to the lack of currently available facility options that could house MWMA's 474 students in year one, our best contingency option would be to utilize the land we have identified for our permanent facility to accommodate temporary classrooms or buildings.

If our contingency plan is temporary classrooms, the first question becomes: "What activates the plan?" We intend to negotiate a provision that sets deadlines for the commencement of various aspects of our facility's development, beginning with the purchase of land; failure to meet these deadlines *empowers the Governing Board of Directors* to exercise its option to pursue the contingency plan and occupy the property with its modular campus at the developer's cost or a drastically reduced land lease. In our opinion, the first deadline should be acquisition of the property. Site acquisition requires the developer to have completed (at least for the most part) due diligence, initial soils testing, initial discussion with city officials, and initial financing. While the Governing Board of Directors intends to stay abreast of information regarding these initial steps, we plan to hold the developer to an acquisition deadline of no later than November 15, 2013. (Note: we set this deadline with the understanding that 60 days of due diligence is not uncommon, plus an additional 1-2 weeks of purchase contract negotiations.) This will allow 45 days to commence construction prior to the end of 2013. The lease will include a second deadline of December 31, 2013 to commence construction. Depending on the construction ordering of the developer, we intend to set additional deadlines that will provide the board with adequate notice of delays in construction. These deadlines will be particularly important prior to March 31, 2014 because the Governing Board of Directors will need sufficient time to reserve and order its temporary classrooms.

The Governing Board of Directors anticipates the cost of delivery and set up for a modular "campus" to be \$310,812 for a twelve-month period. Included in this cost are seven units (two classrooms per unit) for the K-6 program, two units (two classrooms per unit) for 7th and 8th grade, one additional unit (two classrooms for additional office/storage/classroom space), one administrative unit (includes a front desk, two offices, a storage room, a teacher break room, and

staff restrooms), and two toilet trailers. Ideally, we would try to secure classrooms with restrooms in each K-6 unit with an extra toilet trailer for the elementary school, and one dedicated middle school toilet trailer. Each classroom unit is budgeted at 25,736 for year one. This price includes transportation, set up, handrails/ramps for ADA compliance, decks and skirts, and monthly rent. The administrative unit is budgeted slightly higher at \$29,996 to account for the increased rent of this type of unit, and the toilet trailers are budgeted at \$24,596 to account for the slightly decreased rent for this type of unit. While this would be a net cost savings in rent alone when compared to a new facility, other expenses such as low voltage wiring, walking paths, permitting, teardown, and return will make the savings less beneficial, but still present.

Financing Plan

As noted in **Section 4 Market Analysis**, the Governing Board of Directors intends to locate the MWMA facility in South Jordan. Our review of the community's current real estate market revealed that there are no realistic commercial or industrial facility options available at this time. In light of this information, our search focused on unimproved land that provided a sufficient space and layout to accommodate our facility needs. The results of our land search were promising, and our top three options were identified. Options 1 and 2 would likely cost between \$80,000-\$100,000 per acre for a seven-acre parcel, and Option 3 would likely cost approximately \$173,000 per acre (including extra offsite improvement expenses). For purposes of prudent planning, the Governing Board of Directors is projecting land costs to be in the neighborhood of \$175,000/acre for a seven-acre parcel. With a projection for the cost of the land, we finalized our plan by determining the most realistic finance option for obtaining land and constructing the facility (purchase vs. lease).

Short-Term Financing Plan. Lack of funds and financial/operational history is a reality facing all new charter schools when it comes to securing land 10-14 months prior to opening. Our discussions with other charter school founders have taught us that obtaining traditional financing for a first year school is difficult, if not impossible, due to perceived credit risks associated with a new school. Therefore, we believe the most realistic option would be leasing a newly constructed school facility with the intent and ability to purchase.

The option to lease a facility alleviates many issues MWMA will face, but it brings with it new issues to consider in the negotiation and execution of the agreement. Leasing a building places the expense and burden of obtaining financing, securing proper permitting, engaging professionals (engineers, architects, contractors, etc.), and purchasing the property directly on the developer. For budgetary planning purposes, we have projected a lease rate of \$15 per sq ft by taking an average lease rate paid by several similarly sized schools throughout the Wasatch Front and making a market adjustment based on an estimated land cost of \$175,000/acre for a seven-acre parcel and a 38,450 sq ft building. Entering into a landlord/tenant relationship requires a

different framework to ensure the lease agreement is equitable, the facility meets the needs of our stakeholders, and the landlord/developer is reliable and reputable.

A key element will be to ensure the developer has a successful track record of completing similar construction projects in a timely and professional manner. To assist in the process, MWMA will engage an attorney with leasing, real estate, and charter school experience, if possible. This will help ensure a fair price, Board Members' understanding of the lease terms, inclusion of reasonable and customary lease provisions, enforceable and substantive penalties in the event the building is not ready on time, and inclusion of a meaningful purchase option for the school.

0-5 Year Financing Plan. Our willingness to enter into a lease agreement is significantly enhanced by our plan to purchase and own our facility. There are several options available to charter schools seeking long-term financing for the purchase of their facilities. In Utah, most charter schools that have purchased their facilities have financed the purchase through tax-exempt bond offerings through the Utah Charter School Finance Authority or by obtaining a loan through United States Department of Agriculture (USDA) (note: we recognize that a school located in South Jordan would not qualify for USDA financing). Other financing possibilities might include seller financing or a traditional bank loan. Regardless of the ultimate financing vehicle, we are committed to exhausting our financing options and would only purchase our facility on terms and conditions that are in the best interest of the school.

At this point, the most realistic short-term (0-5 years) financing option for MWMA would be purchasing its building through tax-exempt bond offerings through the Utah Charter School Finance Authority. If favorable market conditions exist, we could begin the process of compiling financial data at the end of our second fiscal year in an effort to obtain an S&P investment-grade rating by the middle of our third or fourth fiscal year. This rating process could likely take months to complete, and will require that MWMA's annual financial audits are free of findings and deficiencies, and its financial statements clearly indicate a strong financial position.

Once we have obtained our investment-grade rating, our next step would be to approach bond underwriters that have written and offered bonds for other Utah Charter Schools and begin the process of compiling financial, management, and performance documentation in preparation for a Utah Tax Exempt bond offering to institutional investors. Again, this could be another 3-6 month process depending on market conditions and other factors. Once the bonds are placed with investors, MWMA will ensure that all bond covenants are kept and all payments are made in accordance with the bond documents. This will ensure the future credit worthiness of MWMA and create a favorable atmosphere for future Utah charter schools in the event they choose to enter into the bond market.

Section 6

Detailed Business Plan and Budget

The Governing Board of Mountain West Montessori Academy (MWMA) recognizes that diligence in making sound financial decisions is necessary in order to accomplish the mission of MWMA. This includes ensuring that MWMA is exercising discretion with its expenses, including, but not limited to, facilities, maintenance and operations, staffing and benefits, curriculum, materials, technology, and purchased services. MWMA is therefore committed to being fiscally responsible and will hold the school's Director accountable for prudently administering the budget. As yearly budgets and budget projections are prepared, MWMA will make sure that funds are used in accordance with MWMA's vision and mission. For example, in Year One curriculum purchases will center on Montessori curriculum and furniture purchases in accordance with creating a Montessori environment. Below is a description of activities for appropriate accounting of costs for the planning year, the first and second operational year, and a contingency budget if enrollment only reaches 75% (see **Attachment B**).

Planning Year

MWMA intends to hire a Director by January 2014, contingent on funding. The Director's salary is based on an annual amount of \$68,000. The Director will be working closely with the Board on many start-up activities including, but not limited to: hiring faculty and staff, student recruitment and enrollment, purchasing curriculum and furniture, acquiring technology, and creating a Teacher Handbook and a Parent and Student Handbook. The Director will need a computer to accomplish this work, however it is not anticipated that they will need to rent any space before moving into the school building.

MWMA has budgeted for a six-month salary of \$34,000 for the Director. Benefits are listed separately and included in the budget. Should funding not be available to hire a Director in January 2014, the Board will work closely with the Educational Service Provider (ESP) to complete all necessary start-up activities. The Board Members may establish committees and find volunteers to assist in the process and will complete all duties necessary until such time as a Director can be hired.

In preparation of buying or leasing a facility, and possibly contracting with an Educational Service Provider (ESP), MWMA has included legal fees for the purposes of reviewing contracts, leases, financial agreements, etc. in the amount of \$3,000. In addition, website development, advertising and attestation services are also included at \$5,000 each.

MWMA has budgeted \$8,000 to hire a national consultant to correlate MWMA's curriculum. The consultant will correlate Utah Core Curriculum standards in Language Arts and Mathematics and Utah Core Curriculum standards in all other subjects.

In an effort to guarantee that Mountain West Montessori Academy will be fully equipped on the first day of school, purchases of textbooks, technology equipment, classroom furniture, and classroom supplies will be purchased at the end of the planning year, with delivery scheduled as soon as MWMA's building has received their certificate of occupancy. These purchases will be made using funding from the Charter School Revolving Loan, which MWMA anticipates applying for and receiving.

To aid in the student record keeping, Mountain West Montessori Academy will purchase a Montessori based record keeping system, such as Montessori Records Xpress (MRX). The record keeping system will be utilized in conjunction with the State Information System (SIS). An amount of \$10,000 has been budgeted for this type of Montessori based record keeping system. Desired features of the record keeping system include: progress tracking, building lesson plans that will coordinate with Utah Core Curriculum standards, generating progress reports, maintaining a parent/teacher communication log, and the ability to email student reports to parents.

In addition, Mountain West Montessori Academy will secure a fidelity bond in the amount consistent with Utah Administrative Code R628-4-4. MWMA will ensure that the bond it receives is issued by a corporate surety licensed to do business in the state of Utah and having a current A.M. Best Rating of "A" or better. The Treasurers Bond will be effective as of the date the Treasurer assumes the duties of the office. This bond will be renewed annually to remain in compliance with the aforementioned Utah Administrative Code.

Operational Years 1-2

2014-2015 School Year

Enrollment – MWMA is scheduled to open August 2014. MWMA will open the first year with 474 students, in grades K-8.

Revenue – For the first year of operation, MWMA anticipates receiving \$2,553,271 (for 474 students) in State WPU funding programs and non-WPU programs. Additionally, MWMA anticipates receiving approximately \$75,000 in State Charter School Start-up funding. Funding is determined based on the actions of the 2012 Legislative session without any increase in the WPU for 2014-2015. MWMA also anticipates receiving Federal funding from Special Education IDEA and No Child Left Behind Title I and IIA.

Major Expenses – first year major expenses include the following:

1. Classroom Furnishings – \$40,000 for desks, chairs, etc. to supplement the \$80,000 that was used in the planning year. Furnishings for the library, office, and furniture for computer labs are included in furnishings budget.
2. Computer Equipment – MWMA has budgeted \$130,000 for technology in the planning year and in year one (\$65,000 planned to be spent each year) with an additional \$8,400 for telecommunications. MWMA will invest these funds during the last month of the planning year and the first few months of year one. The approximate investment is as follows:
 - \$61,180 for 92 computers for library research, mobile labs, CTE, and classroom computer stations.
 - \$16,800 for 24 teacher and administration computers.
 - \$8,400 for 21 tablet computers for teacher use and student tracking
 - \$9,500 for a server and needed software
 - \$3,230 for networking equipment
 - \$17,025 for setup and software, including specialized software to support Montessori overlay with the Utah Core Curriculum.
 - \$14,625 has been budgeted for peripheral equipment, such as printers, audio enhancement devices, media players, LCD projectors, interactive white boards, and scanners.
 - \$8,400 for the connectivity to include T1's, cable broadband, and telephone service.
3. Textbooks – Textbooks have been budgeted for an average of \$217 per student totaling \$102,858. Textbooks will be purchased during the end of the planning year (\$55,000) and during the first month and a half of year one (\$47,858).
4. Payroll & Benefits – Projected payroll amounts are shown on the budget. The amount budgeted for a teacher salary is an average of \$34,500 (total anticipated expenditures of \$724,500 for 21 FTEs). Employee benefits are budgeted at \$650 per month year one.
5. Audit and Controls – MWMA will follow all relevant laws and regulations that govern the charter schools within the state of Utah. The Board of Directors will bear the responsibility for the financial oversight of MWMA. As such, the Board will contract with an independent CPA firm to conduct an annual independent audit at the end of each fiscal year, as required by state law.

For the Planning Year, \$5,000 has been budgeted for audit services. Funds in the amount of \$10,000 have been budgeted for audit services and reporting during operational years, including the Annual Financial Audit, October 1st Enrollment Count and Membership Reporting, and annual IRS Form 990 preparation and filing. This budget amount is included

in 2400-300. The audit report will be delivered to both USOE and the Utah State Auditor's Office by November 30 each year in compliance with state requirements.

6. Contract Services – It is MWMA's objective to start the first academic year with a seasoned financial team that understands Utah legislation regarding charter schools, accounting, bookkeeping, compliance, and financial management, while maintaining fiscal responsibility and sound fiduciary practices. To this end, MWMA plans to investigate contracting with an experienced ESP, and if that is not possible, exploring other options for obtaining necessary business management services. If it is determined that the best interests of MWMA will be served by employing the services provided by an ESP, it is anticipated that the services provided may include, but are not limited to: Board training, state compliance, special education consulting, Director mentoring, finance training, monthly and annual budget preparation, bookkeeping, employee recruitment, human resource management, payroll, UCA and grant application preparation, building maintenance, and other special projects and research as directed by the school's Governing Board of Directors and Director. The amount budgeted for these services is \$189,600.

As noted throughout the MWMA charter, the Governing Board of Directors intends to hire an Education Service Provider (ESP) or a business manager (and additional staff) to handle the financial needs of MWMA. For purposes of this budget, the Board has budgeted an amount that will reasonably cover the cost of these services regardless of which option the Board selects. No contract will be offered or signed until MWMA has gone through the RFP process and interviews and considers all applicants. Other services such as snow removal, landscaping, custodial, etc. may also be handled on a contract basis.

7. Fundraising – MWMA has not included any revenue derived from fundraising in the annual budgets that follow. In general, parent volunteers, will take the lead role in coordinating any fundraising efforts. Any donations that are given directly to MWMA will be considered additional revenue for the school year and will be used in addition, not in replacement, of regularly budgeted funds. Any restricted donations will be used in accordance to the donor's request. Any unrestricted donations will be used at the direction of the Governing Board of Directors.
8. Balanced Budget – the Governing Board of Directors and the Director will review the budget at least monthly to assure financial stability. In accordance with 53A-3-19 (303) and (304), MWMA will appoint a business manager. In addition to this, the Governing Board of Directors will appoint a member to review and report on the on-going financial activities of MWMA. This Financial Coordinator will ensure that the Director is keeping within the parameters of the approved budget and that the management company is properly reporting the school's activities in a timely manner. Examples of financial reports that will be submitted include: the Annual Financial Report and Annual Program Reports by October 1st

of each year, the Financial and Enrollment Summary reports submitted monthly for the planning year and first operational year, the Negotiations Report, and following all necessary laws in regards to transparency and certifying at the end of each year these requirements have been met. This oversight provides checks and balances to ensure the proper expenditure of MWMA's funds and help MWMA progress towards having a sufficient cash reserve. MWMA will keep this cash reserve in the budget for unexpected events, decreases in state and/or federal funds or targeted future expenditures.

9. Other major expenses – In addition to the teachers' salaries and benefits as outlined in #4, MWMA anticipates employing other staff members, including:

- One (1) Director at \$68,000,
- One (1) Special Education Teacher and one half-time (0.5) assistant at \$38,000 and \$16,000 annually, respectively,
- One and a half (1.5) Secretary/Office Manager at \$25,000,
- One (1) Media Specialist and one half-time (0.5) assistant at \$28,000 and \$11,000 annually, respectively,
- One half-time (0.5) Counselor at \$21,125 annually, and
- Seventeen (17) Teaching Assistants at a total of \$122,400 annually

To support its staff, MWMA anticipates spending additional funds on supplies, materials, and professional development. MWMA has budgeted \$28,000 for professional development activities (1000-300). These activities will be designed to both strengthen the focus of MWMA as well as aiding in the development and progression of the teaching force.

MWMA has budgeted \$82,858 in the first operational year to provide teachers and students with the necessary materials for instruction. This amount includes giving each teacher the state-mandated allotment for classroom materials and supplies, as well as purchasing general supplies for the teacher workroom.

As outlined in **Section 6, Capital Facility Plan**, MWMA anticipates leasing a building of approximately 38,450 square feet at a rate of \$15.00 per square foot annually. In addition to this lease expense (anticipated being \$504,656 in its first operational year based on 10.5 months out of a 12 month year), MWMA has budgeted the following amounts to ensure that the facility meets the needs of the school:

- \$30,000 for custodial services. It has not been determined whether or not MWMA will contract for these services or hire employees to fill this role.
- \$35,475 (82.5 cents per square foot) for utilities such as electricity, natural gas, water, sewage, garbage collection, etc.
- \$17,500 to insure the building and contents.

- \$5,600 for operational supplies. This includes bathroom products, cleaners, brooms, mops, towels, and other items as needed.

10. Necessary Closure Fund – The MWMA Governing Board of Directors has budgeted \$92,396 the first operational year for expenses associated with implementing the school’s closure plan. This amount exceeds the minimum recommendations, and will be used to do the following: cover payroll for the closure transition team until official winding up of all corporate business, pay for required audit(s) by independent accounting firms, pay for accounting/legal services to the extent these services are not paid through payroll, pay for rent/utilities/taxes throughout the winding up process, maintain insurance throughout the closure process, and pay for any other reasonable and necessary expenses related to the effective corporate dissolution.

2015-2016 School Year

Enrollment – Enrollment will increase by 62 with the addition of a ninth grade, to a total enrollment of 578 students.

Revenue – MWMA is budgeting \$2,814,065 in State Regular WPU and Non WPU funding Year Two. This figure includes a 1.5% increase for the 2015-2016 school year. Additionally, MWMA anticipates receiving approximately \$30,000 in State Charter School Start-up funding.

Major Expenses – second year major expenses include the following:

1. Year Two Major Expenses (excluding payroll)

- Classroom Furnishings – \$52,250 has been budgeted to outfit the classrooms of those items that were not purchased during the planning year and year one of operations. This amount will cover the major furnishing costs for adding grade nine as well as cover small volume purchases for the rest of MWMA.
- Computer Equipment – Year two technology has been budgeted at \$24,150 for the following purchases:
 - \$3,750 has been budgeted five teacher computers
 - \$1,350 has been budgeted additional networking equipment
 - \$310 has been budgeted software upgrades/relicensing
 - \$10,340 has been budgeted for peripheral equipment, such as printers, audio enhancement devices, media players, LCD projectors, interactive white boards, and scanners

- \$8,400 has been budgeted to and an additional T1 line and for the continued connectivity of the previous year
 - Text & Curriculum Materials – \$13,454 (\$217 per student) has been budgeted for textbooks for the additional 62 9th grade students. An additional \$25,000 has been budgeted for books for the library in preparation for accreditation.
2. Payroll & Benefits – Projected payroll amounts are shown on the budget. The amount budgeted for a teacher salary will increase from year one to year two by one percent with an average of \$34,845 (total anticipated expenditures of \$801,435 for 23 FTEs). Benefit stipend will increase to \$675 per month per salaried employee beginning year two in anticipation of an increase in providing health, dental, life and other insurance to MWMA’s employees.
 3. Audit and Controls – MWMA will continue to follow procedures established in year one, as well as reviewing the annual audit performed by the independent CPA firm. Upon review of the audit, the Governing Board of Directors will oversee the implementation of all management comments made by the CPA firm as well as the correction of any audit findings that come as a result of the audit. The Director and the financial team will be required to report on the progress of these items regularly in Board Meetings and other correspondence with the Governing Board of Directors, in particular with the Board Member appointed to oversee finances.
 4. Balanced Budget – Continuing the procedures established in year one, the Governing Board of Directors and the Director will continue to review the budget monthly to assure financial stability. The Board Member assigned to oversee financial matters will assure that the Director is expending funds in accordance with state law and grant regulations, and that all purchasing policies and procedures are followed. MWMA will strive to keep a reserve in the budget for emergency or targeted future expenditures.
 5. Other Major Expenses – As in year one, and in addition to the teachers’ salaries and benefits as outlined in #2, MWMA anticipates employing other staff members, including:
 - One (1) Director at \$70,000,
 - One (1) Assistant Director at \$45,000,
 - One (1) Special Education Teacher and one half-time (0.5) assistant at \$38,380 and \$16,160 annually, respectively,
 - One and a half (1.5) Secretary/Office Manager at \$25,250 annually,
 - One (1) Media Specialist and one half-time (0.5) assistant at \$28,280 and \$11,110 annually, respectively,
 - One (1) Counselor at \$42,250 annually, and
 - Eighteen (18) Teaching Assistants at a total of \$130,896 annually

6. Necessary Closure Fund – The MWMA Governing Board of Directors has budgeted \$113,835 the second operational year for expenses associated with implementing the school’s closure plan. This amount exceeds the minimum recommendations, and will be used to do the following: cover payroll for the closure transition team until official winding up of all corporate business, pay for required audit(s) by independent accounting firms, pay for accounting/legal services to the extent these services are not paid through payroll, pay for rent/utilities/taxes throughout the winding up process, maintain insurance throughout the closure process, and pay for any other reasonable and necessary expenses related to the effective corporate dissolution.

Contingency Budget

MWMA anticipates it will attain full enrollment by the beginning of the first and second years of operation. However, if full enrollment is not achieved, MWMA has prepared a contingency budget based on 75% enrollment. MWMA has determined the amount of non-contingency items (e.g. salaries, employee benefits, building lease, etc.) and contingency items (e.g. instructional supplies, textbooks, property, etc.) that would need to be removed from the contingency budget. The contingency budget is well within statutory limits, specifically maintaining a 5% reserve for both operational years. There will be no 5% reserve during the planning year based on school start-up operation funding.

Indicator – Financial performance and sustainability

Measure	Metric	Board Goal
Current Ratio	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	>1.15
Debt Ratio	$\frac{\text{Total Liabilities}}{\text{Total Assets}}$	<0.9
Occupancy Costs	$\frac{\text{Facility Costs}}{\text{Total Operating Revenues}}$	<22%
Maintain Applicable Bond Covenants	No Default Certification, Audited Financial Statements	No default. School upholds contractual obligations
Current Assets to Total Annual Operating Expenses	$\left[\frac{\text{Current Assets}}{\text{Total Annual Operating Expenses} \div 365} \right]$	>30-60 days cash on hand
Adherence to Budget	$\frac{\text{Budgeted expenditure} - \text{Expenditure}}{\text{Budgeted expenditure}}$	Overall budget to actual expenditures within 5% of budget

Section 7

Fiscal Procedures

Fiscal Procedures

Mountain West Montessori Academy (MWMA) is committed to ensuring sound fiscal procedures. As part of this commitment, MWMA will adopt fiscal procedures to safeguard school assets and resources and procedures surrounding purchasing requirements, as stated by Utah code 63G-6 and Administrative Rule R33. MWMA will also identify the important role of its business manager or Educational Service Provider (ESP) by clearly outlining the job description, including qualifications and duties.

The MWMA Governing Board of Directors understands that they are fiscally responsible for all school assets and appropriate use of state and federal funds. Mountain West Montessori Academy assures that the business manager or ESP will attend all necessary Utah State Office of Education (USOE) School Finance trainings prior to working with the MWMA, and that the business manager or ESP can articulate a clear understanding of why it is important to attend these trainings on a continuing basis. Administrators and/or the Educational Service Provider (ESP) at MWMA will receive training regarding allowable uses of restricted State and Federal (IDEA) special education funds (EDGAR, OMB A-133, and USBE-SER IX and X) and ensure that adequate documentation is maintained to support the use of those restricted funds.

Mountain West Montessori Academy's fiscal procedures will include practices that are consistent with generally accepted accounting principles. This includes, but is not limited to, consistency, relevancy, reliability and comparability.

MWMA's financial information will be gathered and reported consistently across all fiscal periods. The financial information and documentation retained by the school will be appropriately relevant, thereby supporting the financial condition of MWMA. All financial information will be reliable and verifiable by an independent party. This means that MWMA's financial statements will present a clear picture of what is happening with the school at any point in time. MWMA will also ensure comparability. By ensuring comparability, the school's financial statements and other documentation will be comparable in performance to other successful charter schools. Furthermore, MWMA will adhere to the following fiscal procedures:

Calendar of Budget Preparation

An effective Governing Board of Directors provides financial security for a school through oversight of the budget and financial operations. MWMA's finance committee, which is made up of the business manager or ESP, the Director, and selected Board Members, will work together to prepare monthly and annual budgets. The budgets will use the USOE chart of

accounts and budget categories. These budgets will be reviewed and approved in an open Board Meeting with appropriate notice to interested parties, as provided by Utah Code, section 53A-19. All interested persons in attendance at the open board meeting will be given an opportunity to be heard on any item in the budget.

Budget Amendment Process

Any proposed budget changes throughout the year will be reviewed by the finance committee, approved by the Mountain West Montessori Academy Governing Board of Directors in an open meeting, as constituted by Utah Code, section 53A-19, and reported to USOE.

Limits on Appropriations

The MWMA Governing Board of Directors and administration will decide each year on the priorities for the school. The chosen priorities will direct the use of public resources. In the first two operational years, the school will appropriate a substantial amount of resources for hiring, training, and monitoring educational staff that will accomplish the vision and mission of MWMA. However, appropriations in the final annual budget will not be made for any fund in excess of the estimated expendable revenues for the budget year.

Nature and Frequency of Budget Reports

Each month the business manager or ESP will reconcile the accounting books. A budget-to-actual report will then be provided to each member of the Governing Board of Directors as well as the school administration. Financial statements will be provided as required to the chartering entity. MWMA will accommodate any person's request for public documents made in compliance with Utah State Code and Federal regulations governing the request of public records.

Policy on Making Appropriations in Excess of Estimated Expendable Revenue

MWMA takes very seriously its responsibility to wisely and ethically use and manage public funds. The school will maintain a policy of fiscal solvency; no appropriations will be made for any fund in excess of the estimated revenues. Therefore, no budgets may be approved which show a budget deficit. Expendable revenue will be reduced by any existing deficits provided these occur through emergency or other unforeseen circumstances.

Expendable Revenue and Undistributed Reserves

The Mountain West Montessori Academy Governing Board of Directors will work with accounting professionals to set standards on its annual operating safety margins. During the annual budget review, any plans to use expendable revenue and/or undistributed reserves must be

in fulfillment of the school's mission, values and spending priorities and must receive approval in an open meeting.

Emergency Expenditures

In the event of an emergency, the MWMA Director or member of the Governing Board of Directors may authorize expenditures outside of existing budget categories. Such approval must be rare and require notification to the Board President within twenty-four (24) hours or as soon as possible, written determination for the basis of the emergency, and selection of the particular expense budget line item. However, such approval requires justification in the following open board meeting. In the event of an emergency (Utah code, section 17B-1-623), the Governing Board of Directors may, by resolution, amend a budget and authorize an expenditure of money that results in a deficit. This may occur only if the Governing Board of Directors determines that the following three requirements have been met:

- (a) An emergency exists.
- (b) The expenditure is reasonably necessary to meet the emergency.
- (c) The expenditure is used to meet the emergency.

MWMA acknowledges that neither the chartering entity nor the State of Utah, including an agency of the state, is liable for the debts or financial obligations of the school or persons or entities that operate the school.

Purchasing Policies & Procedures (PP&P)

Mountain West Montessori Academy has formally adopted their Purchasing Policies and Procedures (PP&P) by full consent of the Governing Board of Directors in a public meeting on March 16, 2012 (*see* minutes below).

MWMA's PP&P comply with State of Utah procurement policies outlined in Utah Code 63G-6 and Administrative Rule R33. The MWMA PP&P is attached hereto under **Attachment C**.

Purchasing Policy & Procedures Minutes

Mountain West Montessori Academy
Governing Board of Directors

Friday, March 16, 2012

Location: 10672 South Redwood Road
South Jordan, UT 84095

Board Members Present: Angie Johnson, Linda Hume, Dan Galli, Rusty Bentley

MINUTES

4:34 PM – CALL TO ORDER by Angie Johnson

CONSENT ITEMS

- Dan Galli moved to approve the Board Meeting Minutes from March 2, 2012; Linda Hume seconded the motion.
Motion passed unanimously.

VOTING ITEMS

- Linda Hume moved to approve the Purchasing Policy and Procedures; Rusty Bentley seconded the motion.
Motion passed unanimously.

ADJOURN

- Linda Hume moved to adjourn the Board Meeting; Dan Galli seconded the motion.
Motion passed unanimously.

4:35 PM – ADJOURNED

USOE School Finance Training

Mountain West Montessori Academy has intentions to investigate contracting with a full-service Educational Service Provider (ESP) for many of the business requirements, which includes, but is not limited to, USOE school finance trainings. The business manager or a well-qualified representative from the Education Service Provider will attend and complete this training. In addition, the school will ensure that a representative from the MWMA Governing Board of Directors, preferably the Financial Coordinator, will attend the USOE school finance training and all other required finance trainings *prior to* the first day of school. The school makes this commitment not only because it is required, but also because it recognizes the importance of

sound financial policies/procedures and the importance of understanding the financial reporting and use requirements associated with state and federal funds.

MWMA recognizes the reality of an ever-changing landscape in public education finance and feels it is critical to the financial success of the school that its representatives stay up-to-date and informed on public finance changes and current issues. This will ensure that the MWMA staff receives the latest and most accurate information available concerning technical requirements specific to school finance. Furthermore, MWMA will ensure that its representatives attend future/ongoing trainings as they become available to ensure that the school manages and accounts for its funds in compliance with any revisions to rules governing the financial management of the school.

Business Administrator

Mountain West Montessori Academy will investigate contracting with a full-service Educational Service Provider (ESP) to fulfill the requirements of the business administrator, which is consistent with U.C.A. 53A-3-302. The Governing Board of Directors will also specify the duties of the ESP, according to U.C.A. 53A-3-303. Please refer to **Section 15 – Educational Service Provider** for additional qualifications and services. Business manager or ESP financial duties include, but are not limited to:

- Attend all meetings of the Governing Board of Directors, keep an accurate record of its proceedings, and have custody of the seal and records;
- Be custodian of all school funds after deposit in the school’s account by action of the Board Financial Coordinator;
- Countersign with the President of the Governing Board of Directors legal documents approved by the Board;
- Attend all necessary Utah State Office of Education (USOE) School Finance trainings;
- Keep accurate records of all revenues received, their sources, dates availability, and federal and state allowable expenditures to ensure that funds are spent in line with rules of state and Federal programs;
- Prepare and submit to the Governing Board of Directors each month a written reports of the school’s receipts and expenditures;
- Use uniform budgeting, accounting, and auditing procedures and forms approved by the State Board of Education, which shall be in accordance with generally accepted accounting principles or auditing standards and Title 63J, Chapter 1, Utah Budgetary Procedures Act;

- Prepare and submit to the Governing Board of Directors a detailed annual statement for the period ending June 30, of the revenues and expenditures, including beginning and ending fund balances;
- Assist the Director in the preparation and submission of budget documents and fiscal reports required by law or the State Board of Education;
- Insure that adequate internal controls are in place to safeguard the school's funds; and
- Perform other duties as the Director may require.

Section 8

Organizational Structure and Governing Body

School Leaders

Mountain West Montessori Academy (MWMA) is organized as a nonprofit corporation pursuant to the Utah Revised Nonprofit Corporation Act. Pursuant to its bylaws, MWMA is governed by five to seven Board Members. Membership on the Governing Board of Directors is determined by majority vote of the Governing Board of Directors, and members serve three-year terms unless otherwise specified in the Bylaws.

The Governing Board of Directors adheres to the philosophy that the ability of the school to carry out its mission and meet its goals depends heavily on the Governing Board of Director's ability to provide strategic direction, select and support strong school leaders, and ensure the financial stability of the school. To accomplish this goal, members of the Governing Board of Directors should possess personal qualities that can be summarized as: (1) the ability to see the "big picture" and the conviction to set the proper course to achieve the MWMA mission; (2) the integrity to continually serve the interests and pursue the goals of MWMA; (3) knowledge of the school, its stakeholders, its organizational structure, and its managerial acumen; and (4) possession of a respectful and professional attitude toward colleagues.

In addition to the many duties/responsibilities of the Governing Board of Directors, one of its key responsibilities is to ensure MWMA is meeting and/or exceeding the benchmarks and goals established throughout this charter. As part of its charter, the Governing Board of Directors has established the goals listed at the end of this section that are related to Board performance and stewardship.

Following are the Background Information Sheets and Consent for Background Checks for each Board Member of the MWMA Governing Board of Directors.

BACKGROUND INFORMATION SHEET

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name: Angela Michelle Johnson

Role with school: Board President

Expertise: Middle School educator, currently pursuing M.A. in Mathematics Education, versed in Montessori philosophy and curriculum development, also experienced in small business management including leadership, budgeting, hiring practices, payroll, and employment agreements.

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role on the governing board, expertise you bring to the board, and commitment to this application as it has been written.

I am committed to serving on the Mountain West Montessori Academy Governing Board of Directors in order to help create a school that will serve my community's children in innovative ways by offering a Montessori education in a charter school setting. I am dedicated to the Montessori ideal of individualized, experiential, and student-centered education and to the principle of choice in education. As an educator and parent, I want to be involved in advancing the quality of education in the state of Utah as detailed in the MWMA Charter. I bring to this process my personal and professional experience in education, my background in small business, and most importantly, my love of learning.

Not-for-Profit History:

Using as much space as necessary below, please provide your nonprofit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation and management of a nonprofit corporation, governing board experience, and background in group organization.

I have experience in group organization, including the opportunity to co-found the middle school program at a small private non-profit Montessori school. Besides evaluating and implementing curriculum, I managed employees, facilitated national and international extended field trips, and planned and executed fund-raising activities. I have also organized S-Corporations, established management systems for a dental business, and organized family trusts and LLCs. I look forward to utilizing my non-profit experiences by serving on the Mountain West Montessori Academy Governing Board of Directors.

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

As previously stated, I developed an academic program for 7th and 8th graders at a non-profit Montessori school, which included reviewing, assessing, and implementing curriculum in all subjects during my employment from 2006-2011. I have also managed classroom budgets and fund-raising budgets to support our experiential curriculum, which included weekly field trips and extended field trips.

From 1997-2001, I organized and served as office manager at a dental practice. I developed policies and procedures, managed personnel, established budgets, and performed strategic planning for the business, which included marketing, fee surveys, and patient relations. I currently maintain a part-time human resource and consulting position with the practice at my home office in which I maintain payroll and benefits, establish budget parameters, and liaison with legal and accounting professionals.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

I graduated from Cooper High School in Abilene, Texas with Honors in 1987. I obtained a B.S. degree in Microbiology in 1991 with a four-year full tuition National Merit Scholarship. I completed a Montessori Elementary Classroom Director certification from the Institute of Guided Studies in 2008. I am currently a candidate for a M.A. in Mathematics Education through Western Governors University with a projected graduation date of December 2013, which will include state licensure.

*The information provided will be subject to verification by the board.

AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND CHECK

Instructions: Return this signed and notarized affidavit with the application.

Name: Angela Michelle Johnson

Address: 2869 Chalk Creek Way

City, State, Zip: South Jordan, UT 84095

<p>1. Have you ever been convicted or pled “no contest,” or received a plea in abeyance for any violation of law other than minor traffic offenses? If any of the above has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>2. Do you assure to complete a background check within 90 days of charter approval by the State Board of Education? All prospective members of Boards of Directors of charter schools must be willing to submit to a background check within 90 days of charter approval by the State Board of Education, A background check requires fingerprinting consistent with educator-license candidates and public school employees in Utah. The check will reveal all arrests and convictions for offenses above minor traffic offenses that occurred in any state that are on the applicant’s record after he was 18 years old. The background check applicant is responsible for the cost of the background check.</p>	<p>YES [<input checked="" type="checkbox"/>] NO[]</p>
<p>4. Have you ever declared bankruptcy personally in the 7 years preceding the date of this application or has any business entity or corporation in which you have or had “substantial interest” as defined under 67-16-3(15) declared bankruptcy in the 7 years preceding the date of this application?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>4. Do you have outstanding or unresolved civil judgments against you?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>



A background check that reveals offenses that have occurred in the previous five years, recent bankruptcies, or unresolved civil judgments may necessitate further explanation to the chartering entity from a prospective charter school board member. Matters or offenses that remain unresolved or unexplained to the satisfaction of the chartering entity may affect the credibility and/or final approval of a charter school application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR MOUNTAIN WEST MONTESSORI ACADEMY.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

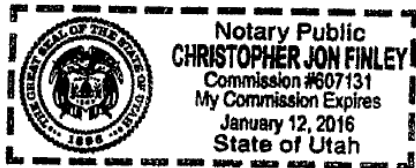
_____ 
Applicant's Signature

Subscribed and sworn before me this 16th day of March Year 2012.

County of Salt Lake State of Utah

Notary Public 

My Commission Expires 1/12/2016



BACKGROUND INFORMATION SHEET

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name: Stephen Barnes

Role with school: Vice President

Expertise: Financial, Education, Local Government

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role on the governing board, expertise you bring to the board, and commitment to this application as it has been written.

My unique experience in education stems from being a Substitute Teacher and an LDS Seminary Teacher. Education is something that is near and dear to my heart and teaching is a passion that I enjoy very much. My skillsets include maintaining sound economic principles and being technology literate. As an elected Councilman for South Jordan City, I and have been participating in board functions and trainings which have expanded my knowledge of leadership roles. My commitment to Mountain West Montessori Academy is to keep it fiscally sound and share my experience in maintaining a governing non-profit board.

Not-for-Profit History:

Using as much space as necessary below, please provide your nonprofit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation and management of a nonprofit corporation, governing board experience, and background in group organization.

I am an elected member of the South Jordan City Council and have been actively serving in that capacity since being sworn in.

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

Before earning my degree in Mass Communication from the University of Utah I spent several years working as a Substitute Teacher for the Granite School District and also worked as a part-time Seminary Teacher for the LDS Church Educational System. Since graduating, I worked for eight years in the Financial Services industry and bring sound economic principles to the table as

a result. For the past four years, I have worked in the software industry, which has broadened my experience greatly.

Last November, I was elected to the South Jordan City Council and have been actively serving in that capacity since being sworn in this year. In my current job at AdvancedMD, I created a training program for the sales reps that was adopted by upper management to train each other on products and the competitive intelligence on products that we compete with. This was outside of my normal responsibilities and something that I did to further the training of myself and other new sales representatives to the company.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

BA in Mass Communication from the University of Utah in May, 2000

Study Abroad in Israel, Egypt, and Jordan through Brigham Young University in April, 1996

*The information provided will be subject to verification by the board

AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND CHECK

Instructions: Return this signed and notarized affidavit with the application.

Name: Stephen Barnes

Address: 4268 W. 11430 S.

City, State, Zip: South Jordan, UT 84095

<p>1. Have you ever been convicted or pled “no contest,” or received a plea in abeyance for any violation of law other than minor traffic offenses? If any of the above has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.</p>	YES [] NO[<input checked="" type="checkbox"/>]
<p>2. Do you assure to complete a background check within 90 days of charter approval by the State Board of Education? All prospective members of Boards of Directors of charter schools must be willing to submit to a background check within 90 days of charter approval by the State Board of Education, A background check requires fingerprinting consistent with educator-license candidates and public school employees in Utah. The check will reveal all arrests and convictions for offenses above minor traffic offenses that occurred in any state that are on the applicant’s record after he was 18 years old. The background check applicant is responsible for the cost of the background check.</p>	YES [<input checked="" type="checkbox"/>] NO[]
<p>3. Have you ever declared bankruptcy personally in the 7 years preceding the date of this application or has any business entity or corporation in which you have or had “substantial interest” as defined under 67-16-3(15) declared bankruptcy in the 7 years preceding the date of this application?</p>	YES [] NO[<input checked="" type="checkbox"/>]
<p>4. Do you have outstanding or unresolved civil judgments against you?</p>	YES [] NO[<input checked="" type="checkbox"/>]

A background check that reveals offenses that have occurred in the previous five years, recent bankruptcies, or unresolved civil judgments may necessitate further explanation to the chartering entity from a prospective charter school board member. Matters or offenses that remain unresolved or unexplained to the satisfaction of the chartering entity may affect the credibility and/or final approval of a charter school application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR MOUNTAIN WEST MONTESSORI ACADEMY.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's Signature

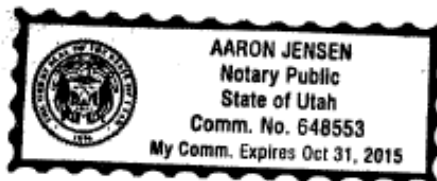
Subscribed and sworn before me this 26 day of March Year 2012.

County of Salt Lake State of Utah.

Notary Public



My Commission Expires Oct. 31, 2015



BACKGROUND INFORMATION SHEET

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name: Daniel Galli

Role with school: Vice-President

Expertise: Small Business Owner, Real Estate Broker, Civil Servant

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role on the governing board, expertise you bring to the board, and commitment to this application as it has been written.

I am excited to bring my problem solving, critical thinking, and public relations experience to the Governing Board of Directors at Mountain West Montessori Academy (MWMA). I have lived and worked in South Jordan since 2004. I own Realty Resolutions and consistently work with the residents of this community and those interested in becoming a resident of this community. I am currently involved with Assisted Living of South Jordan, a new luxury residence for the elderly in the community. In 2011, I campaigned to serve on the South Jordan City Council. I have strong people skills and I truly enjoy working with the public. I support the mission of MWMA because I understand our community's need for additional education options that will include student interest based learning in the Montessori Philosophy.

Not-for-Profit History:

Using as much space as necessary below, please provide your nonprofit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation and management of a nonprofit corporation, governing board experience, and background in group organization.

During the last election cycle I campaigned to serve on the South Jordan City Council. Though unsuccessful in my bid, I grew fond of public service and I continue to participate through a variety of avenues. Through Kenya Keys, a nonprofit organization that believes education is the most important weapon against poverty, I support Kenyan students as they try to gain education. My sponsorship is supporting Mwahui Ramadhan, a student who is on schedule to graduate from High School this year.

Each week I work with the Boy Scouts of America. I teach the boys in my troop life skills and try to instill the values that will help them as they grow to become active members of society. We are currently covering the topic 'Citizenship in the Community'. They will learn how the local government works and how they can make valuable contributions for the benefit of all.

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

I am a fully licensed real estate agent with over fifteen years experience. My skills include selling existing homes as well as securing property and coordinating new construction. I also have obtained my broker license. I currently own my own real estate brokerage firm and have three other agents associated. In 2010 I purchased a home in South Jordan and began renovations to create Assisted Living of South Jordan, along with its sister company Assisted Living of Draper. My goal is to create an assisted living experience like none other. The complex is designed to feel luxurious and comfortable to make the residents feel that this is their home. My vision is for the elderly to be able to live in a beautiful home setting rather than a facility. Assisted Living of South Jordan is scheduled to open later this spring and will be a wonderful addition to the current assisted living residences in the city.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

Though I attended courses at Salt Lake Community College and the University of Utah, regrettably I never completed my college education. I value those years and I still rely on the skills I learned in those classes. It is my goal to complete my education and encourage youth to gain the highest possible level of education according to their interest level.

*The information provided will be subject to verification by the board.

AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND CHECK

Instructions: Return this signed and notarized affidavit with the application.

Name: Daniel Galli

Address: 11763 Chalk Creek Way

City, State, Zip: South Jordan, UT 84095

<p>1. Have you ever been convicted or pled “no contest,” or received a plea in abeyance for any violation of law other than minor traffic offenses? If any of the above has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.</p>	YES [<input type="checkbox"/>] NO [<input checked="" type="checkbox"/>]
<p>2. Do you assure to complete a background check within 90 days of charter approval by the State Board of Education? All prospective members of Boards of Directors of charter schools must be willing to submit to a background check within 90 days of charter approval by the State Board of Education, A background check requires fingerprinting consistent with educator-license candidates and public school employees in Utah. The check will reveal all arrests and convictions for offenses above minor traffic offenses that occurred in any state that are on the applicant’s record after he was 18 years old. The background check applicant is responsible for the cost of the background check.</p>	YES [<input checked="" type="checkbox"/>] NO [<input type="checkbox"/>]
<p>4. Have you ever declared bankruptcy personally in the 7 years preceding the date of this application or has any business entity or corporation in which you have or had “substantial interest” as defined under 67-16-3(15) declared bankruptcy in the 7 years preceding the date of this application?</p>	YES [<input type="checkbox"/>] NO [<input checked="" type="checkbox"/>]
<p>4. Do you have outstanding or unresolved civil judgments against you?</p>	YES [<input checked="" type="checkbox"/>] NO [<input type="checkbox"/>]

A background check that reveals offenses that have occurred in the previous five years, recent bankruptcies, or unresolved civil judgments may necessitate further explanation to the chartering entity from a prospective charter school board member. Matters or offenses that remain unresolved or unexplained to the satisfaction of the chartering entity may affect the credibility and/or final approval of a charter school application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR MOUNTAIN WEST MONTESSORI ACADEMY.


I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



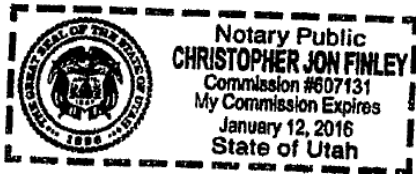
Applicant's Signature

Subscribed and sworn before me this 16th day of March Year 2012.

County of Salt Lake State of Utah.

Notary Public _____

My Commission Expires 1/12/2016



BACKGROUND INFORMATION SHEET

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name: Rusty Bentley

Role with school: Secretary

Expertise: Governance, Finance, and Leadership

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role on the governing board, expertise you bring to the board, and commitment to this application as it has been written.

As a parent of four young children, I have come to realize that every child is unique. The way I communicate and interact with each of my children is different based on their personalities. I feel the way we educate children also requires us to be different. Students should be able to learn and grow based on his or her own individual personality and at their own pace. I look forward to serving on Mountain West Montessori Academy Governing Board of Directors to spread the focus of individualized learning and promote student growth.

Not-for-Profit History:

Using as much space as necessary below, please provide your nonprofit history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the operation and management of a nonprofit corporation, governing board experience, and background in group organization.

A TLC Adoption Agency, Layton, UT
Board Member, July 2003-October 2005

As a Board Member I helped promote awareness of the adoption agency. My key roles were with marketing materials and promotional events. In addition, I worked with the state agencies to ensure we were included on state lists of approved agencies. By serving on the Board I was able to gain invaluable governance experience and learn the intricacies of working with a non-profit association.

Other organizations I have served on include my students Parent Teacher Association to help organize and run school events, the Boy Scouts of America, and my religious groups Young Men's group to plan and coordinate activities, lessons, and campouts. I also coach a 9U Superleague baseball team called the Sojo Rockcats. The team is composed of twelve 8-9 year old boys. The team plays competitively so we work diligently in creating a team environment that has helped me develop leadership skills in group organization.

Employment History:

Using as much space as necessary below, please provide your employment history that supports your qualifications and relates your experiences to be considered sufficiently qualified to operate a charter school. Specifically address your qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.

TriQuest (Fundraising Division of Access Development)

President, December 2011-Present

Vice President of Marketing and Operations, November 2009-December 2011

TriQuest uses proven fundraising systems combined with products that communities know, love, and buy to support non-profit organizations and schools. TriQuest provides personal support and a game plan that has delivered proven results for schools and organizations nationwide. As the Vice President I worked to develop marketing programs and understand and relate with others the financial aspect of fundraising for schools. As the President of TriQuest we have 150 employees that report to me through my advisors.

Access Development

Senior Director New Market Development, June 2008-November 2009

National Sales Director, April 2005-June 2008

The Access mission has been to create America's best private-label network of merchant discounts and rewards. Access Development has over 250,000 participating merchants offering discounts of up to 50% in virtually every U.S. market. With Access Development I had oversight over twenty-five other employees and provided the leadership aspect to the sales team.

OptumInsight – Formerly Ingenix (a UHG Company)

Senior Sales Administrator Analyst, August 2003-2005

Financial Analyst, January 2002-August 2003

New Product Sales Manager, January 1999-2002

OptumInsight specializes in improving the performance of the health system by providing analytics, technology, and consulting services that enable better decisions and results.

OptumInsight advocates for the use of health information to save lives, improve care, and transform health communities. Applied at the right time and in the right place — when decisions need to be made — information can enhance the affordability, quality, usability and accessibility of care. As a Financial Analyst I reviewed the sales, managed a 900 million dollar budget over six business units, and provided forecasts on expectations and company goals.

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

University of Utah BS Economics 1998-2003

Utah State University MBA 2008-Present

*The information provided will be subject to verification by the board

AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND CHECK

Instructions: Return this signed and notarized affidavit with the application.

Name: Rusty Bentley

Address: 11537 S. Lizzie Cove

City, State, Zip: South Jordan, UT 84095

<p>1. Have you ever been convicted or pled “no contest,” or received a plea in abeyance for any violation of law other than minor traffic offenses? If any of the above has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>2. Do you assure to complete a background check within 90 days of charter approval by the State Board of Education? All prospective members of Boards of Directors of charter schools must be willing to submit to a background check within 90 days of charter approval by the State Board of Education, A background check requires fingerprinting consistent with educator-license candidates and public school employees in Utah. The check will reveal all arrests and convictions for offenses above minor traffic offenses that occurred in any state that are on the applicant’s record after he was 18 years old. The background check applicant is responsible for the cost of the background check.</p>	<p>YES [<input checked="" type="checkbox"/>] NO[]</p>
<p>4. Have you ever declared bankruptcy personally in the 7 years preceding the date of this application or has any business entity or corporation in which you have or had “substantial interest” as defined under 67-16-3(15) declared bankruptcy in the 7 years preceding the date of this application?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>4. Do you have outstanding or unresolved civil judgments against you?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>

A background check that reveals offenses that have occurred in the previous five years, recent bankruptcies, or unresolved civil judgments may necessitate further explanation to the chartering entity from a prospective charter school board member. Matters or offenses that remain unresolved or unexplained to the satisfaction of the chartering entity may affect the credibility and/or final approval of a charter school application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR MOUNTAIN WEST MONTESSORI ACADEMY.

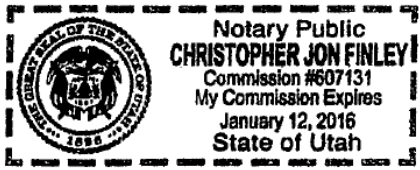
I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

PHABLEY
Applicant's Signature

Subscribed and sworn before me this 16th day of March Year 2012.

County of Salt Lake State of Utah

Notary Public Ch. Finley My Commission Expires 1/12/2016



BACKGROUND INFORMATION SHEET

Provide the following information on each founder, governing body member, and any individuals responsible for the day-to-day operation of the school who have already been identified. Complete this form, do not include a resume. This page may be copied as many times as necessary.*

Name: Linda Hume

Role with school: Financial Coordinator

Expertise: Computer & Information Technology, School Office Management, and Accounting

Statement of Intent:

Using as much space as necessary below, provide a personal statement regarding your role on the governing board, expertise you bring to the board, and commitment to this application as it has been written.

I am a founding Board Member of Mountain West Montessori Academy because I firmly believe that a Montessori education is extremely beneficial to every child and to our society. I believe that a Montessori education should be available to all children, not just those who can afford private school. While raising my children, I worked at a non-profit Montessori elementary and middle school. I saw firsthand the successes of a Montessori education; the willingness of the children to ask questions, to work together to find solutions, and to set and accomplish goals. Upon my return to the University of Utah to pursue a Masters of Accounting, I became convinced that a Montessori education does a better job of preparing children for adult life. Many of the college students that I have met are academically bright and well prepared to master any exam, but unfortunately they do not know how to learn, rather they know how to be taught. Our fast-paced, ever changing work environment requires people to be self-starters who can think creatively. Our society needs citizens who ask questions and work together to implement solutions.

I have experience in business, as a software developer and manager, and in education, as an associate lecturer in Accounting at the University of Utah. In addition, I have experience as the office manager of a non-profit Montessori school. My two sons received a Montessori education from the age of four until they graduated from middle school. They now attend two different charter high schools. I am able to bring to the Board not only my expertise in information technology and accounting, but also my experience as a parent raising twin boys with very different learning styles and educational needs. I believe in both a Montessori education and in the public charter school system. I am excited and proud to be part of founding Mountain West Montessori Academy.

and multiple volunteers to provide support for front office and teachers. Provided tours for prospective student families. Organized the development and printing of a monthly school newsletter. Maintained school website, e-mails, school computers, and school computer network. Created a custom student database.

During the remodeling of a building for use by the school, Linda worked with the telephone company to install the new phone system. She also designed and supervised implementation into the student database.

- 1991-1993 Office Manager of non-profit church
Good Shepherd Lutheran Church, Sandy Utah
- 1987-1990 Software Development Manager/ Product Manager
NCR, San Diego California

Education History:

Using as much space as necessary below, please provide information on your educational training (including degrees earned, dates enrolled, and institutions) that supports your qualifications to be considered sufficiently qualified to operate a charter school.

B.S. Computer Engineering 1982 – University of California, San Diego

Master of Accounting 2011 – University of Utah

UACPA Outstanding Accounting Student of the Year for University of Utah, 2011

*The information provided will be subject to verification by the board

AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND CHECK

Instructions: Return this signed and notarized affidavit with the application.

Name: Linda Hume

Address: 13962 Maple Hollow Circle

City, State, Zip: Draper, UT 84020

<p>1. Have you ever been convicted or pled “no contest,” or received a plea in abeyance for any violation of law other than minor traffic offenses? If any of the above has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>2. Do you assure to complete a background check within 90 days of charter approval by the State Board of Education? All prospective members of Boards of Directors of charter schools must be willing to submit to a background check within 90 days of charter approval by the State Board of Education, A background check requires fingerprinting consistent with educator-license candidates and public school employees in Utah. The check will reveal all arrests and convictions for offenses above minor traffic offenses that occurred in any state that are on the applicant’s record after he was 18 years old. The background check applicant is responsible for the cost of the background check.</p>	<p>YES [<input checked="" type="checkbox"/>] NO[]</p>
<p>4. Have you ever declared bankruptcy personally in the 7 years preceding the date of this application or has any business entity or corporation in which you have or had “substantial interest” as defined under 67-16-3(15) declared bankruptcy in the 7 years preceding the date of this application?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>
<p>4. Do you have outstanding or unresolved civil judgments against you?</p>	<p>YES [] NO[<input checked="" type="checkbox"/>]</p>

A background check that reveals offenses that have occurred in the previous five years, recent bankruptcies, or unresolved civil judgments may necessitate further explanation to the chartering entity from a prospective charter school board member. Matters or offenses that remain unresolved or unexplained to the satisfaction of the chartering entity may affect the credibility and/or final approval of a charter school application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR MOUNTAIN WEST MONTESSORI ACADEMY.

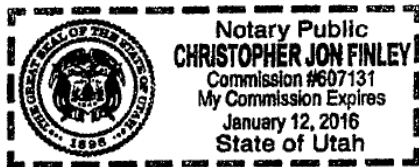
I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Linda Joy Herre
Applicant's Signature

Subscribed and sworn before me this 16th day of March Year 2012.

County of Salt Lake State of Utah.

Notary Public Ch. Finley My Commission Expires 1/12/2016



Nonprofit Experiences

The Mountain West Montessori Academy Governing Board of Directors is comprised of parents and professionals with exceptional nonprofit experience that will create a solid foundation in governance to steer the mission and vision of the school. As a whole, the Governing Board of Directors will utilize each Board Member's expertise to provide legal, financial, and managerial oversight to ensure the appropriate use of public funds.

As detailed above in the Background Information Sheets, several MWMA Governing Board Members have quality nonprofit experience. Steve Barnes has nonprofit experience serving as Councilman for South Jordan City. Steve understands the functions of a governing board and the value of being a public servant. His involvement has allowed him to learn appropriate governance practices, how to set policies and procedures, how to work on and supervise committees, and how to oversee public funds. He has also served as a Seminary Teacher for the LDS CES, which has afforded him the opportunity to engage with students in the classroom and understand teachers' needs regarding classroom management.

Rusty Bentley's service as a Board Member for the nonprofit TLC Adoption Agency was utilized to help advertise and promote the agency. His responsibilities included creating media kits, generating marketing collateral, and organizing and coordinating promotional events. Rusty's understanding of creating a cohesive brand will help MWMA create its own individual look and feel that community members will be able to recognize and associate with a quality education. Rusty is technologically proficient and has utilized his skills at the nonprofit adoption agency, his children's Parent Teacher Association, and in various religious positions.

Linda Hume's nonprofit experience includes serving on the Finance Committee of the Philanthropic Education Organization (PEO) and serving as a committee member at the nonprofit Montessori at Riverton School. Linda helped develop annual budgets and coordinated finances for the PEO. She will be able to utilize her background in finances to steer appropriate financial decisions at MWMA. Linda's service as a committee member at the Montessori of Riverton included creating a database of student records, designing and launching the revised school website, and creating a technology plan. Her valuable experience of creating and implementing technology in a nonprofit school environment will help MWMA implement a student information system and support technology driven communications with the school community.

Although not all MWMA Governing Board members have significant nonprofit governing/management experience, each member brings specific skills and qualities to our board. For example, Angie Johnson's leadership was imperative to co-founding a nonprofit middle school program at the Montessori of Riverton. At the nonprofit Montessori, Angie supervised staff, assessed student performance, managed school assets, and advocated for the

students and families. Also, Dan Galli has served youth through the Boy Scouts of America to help them understand local government and the value of contributing back to the community. Dan is able to assist the youth with these standards because of his experience campaigning for the South Jordan City Council and also volunteering through various activities in the city.

The MWMA Governing Board of Directors showcases significant nonprofit experience through service on governing boards, understanding the significance of hiring a quality Director and supporting the Director in hiring highly qualified school personnel, and creating long-term financial forecasts and budgets. The Governing Board of Directors will ensure accountability to stakeholders by providing effective oversight through leadership, not daily management.

Articles of Incorporation

ARTICLES OF INCORPORATION OF MOUNTAIN WEST MONTESSORI ACADEMY, INC.

The undersigned natural persons over the age of eighteen (18) years, acting as incorporators of a nonprofit corporation under the Utah Revised Nonprofit Corporation Act, adopt the following Articles of Incorporation for said corporation:

ARTICLE I NAME

The name of this nonprofit corporation shall be Mountain West Montessori Academy, Inc.

ARTICLE II DURATION

This corporation shall continue in existence perpetually unless dissolved pursuant to law.

ARTICLE III PURPOSES

- (1) To operate exclusively as a nonprofit corporation under the laws of the state of Utah.
- (2) To engage in any and all activities and pursuits, and to support or assist such other organizations, as may be reasonably related to the foregoing and following purposes.
- (3) To engage in any and all other lawful purposes, activities and pursuits, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code of 1986 or corresponding provisions of any subsequent

Federal tax laws (the “Code”) and are consistent with those powers described in the Utah Revised Nonprofit Corporation Act, as amended.

(4) To solicit and receive contributions, purchase, own and sell real and personal property, to make contracts, to invest corporate funds, to spend corporate funds for corporate purposes, and to engage in any activity “in furtherance of, incidental to, or connected with any of the other purposes.”

(5) No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its members, trustees, directors, officers, or other persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered to the corporation and to make payments and distributions in furtherance of the purposes set forth herein.

ARTICLE IV VOTING MEMBERS

This corporation shall not issue shares of stock evidencing membership and shall have no voting members.

ARTICLE V POWERS

A. Powers in General. Subject to the pursuits and objectives declared in Article III and any other limitations herein expressed, this corporation shall have the power to do any and all things which a nonprofit corporation may do under the laws of the State of Utah, including, but not limited to, the following:

(1) To receive, acquire, hold, manage, administer, and expend property and funds for purposes authorized by Section 501(c)(3) of the Code;

(2) To borrow money either upon or without security, giving such promissory notes or other evidences of indebtedness and such pledges, mortgages, or other instruments of hypothecation as it may be advised;

(3) To hold, in its own name and right, real and personal property of every nature and description without limitation as to extent, character or amount, and with all the powers of control, management, investment, change, and disposal incident to the absolute ownership of property or funds by a private person, subject only to the terms of particular trusts and to the general trust that all its properties and funds shall be held for purposes authorized by Section 501(c)(3) of the Code;

(4) To take property and funds by will, gift, or otherwise. The corporation shall not have the power to take or hold property or funds for any purpose other than purposes authorized by Section 501(c)(3) of the Code;

(5) To appoint and pay officers and agents to conduct and administer the affairs of the corporation;

(6) To adopt Bylaws prescribing the duties of the officers and agents of the corporation, the detail of the organization, the time and manner of its meetings, and any and all detail incident to its organization and the efficient conduct and management of its affairs;

(7) To do any and all things which a natural person might do which are necessary and desirable for the general purposes for which the corporation is organized;

(8) To receive and use funds obtained from private donations, devises and bequests, and from all lawful sources to be applied for purposes authorized by Section 501(c)(3) of the Code;

(9) No recital, expression or declaration of specific or special powers or purposes hereinabove enumerated shall be deemed exclusive, it being intended that this corporation shall have any and all other powers necessary or incidental to the accomplishment of its objects and purposes and each and all of the powers now conferred or that may hereafter be conferred by the laws of the State of Utah on nonprofit corporations.

B. Powers Relating to Specific Objects and Purposes. This corporation shall have the powers necessary or incidental to the carrying on of its objects and purpose.

C. Restrictions. Notwithstanding any statement to the contrary in these Articles of Incorporation, no part of the net earnings of the corporation shall inure to the benefit of any director or officer of the corporation or any private individual, except that reasonable compensation may be paid for services rendered to or for the corporation affecting one or more of its purposes; and no director or officer of the corporation or any private individual shall be entitled to share in the distribution of any of the corporate assets on dissolution of the corporation. No substantial part of the activities of this corporation shall be the carrying on of propaganda or otherwise attempting to influence legislation (except as permitted by Section 501 of the Internal Revenue Code of 1986 or corresponding provisions or any subsequent Federal tax laws), and the corporation shall not participate in or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office. This corporation shall not carry on, otherwise than as an insubstantial part of its activities, activities which are not in furtherance of one or more of the aforementioned purposes for which the corporation is organized.

ARTICLE VI REGISTERED OFFICE & AGENT

The street address of the corporation's initial registered office is 13962 Maple Hollow Circle, Draper, Utah 84020. The name of the corporation's initial registered agent at said initial registered office is Linda Hume.

ARTICLE VII INCORPORATORS

The names and addresses of the incorporators are:

Angie Johnson
2869 Chalk Creek Way
South Jordan, UT 84095

Linda Hume
13962 Maple Hollow Circle
Draper, UT 84020

Dan Galli
11763 Chalk Creek Way
South Jordan, UT 84095

Rusty Bentley
11537 S Lizzie Cove
South Jordan, UT 84095

Steve Barnes
4268 W. 11430 S.
South Jordan, UT 84095

ARTICLE VIII DIRECTORS

The number of directors of the corporation shall be no less than five (5) and no more than seven (7), as fixed from time to time pursuant to the provisions contained in the corporation's Bylaws. The number of directors constituting the present Board of Directors is five (5), and the names and addresses of the persons who are to serve as directors until their successors are selected and qualified are:

Angie Johnson
2869 Chalk Creek Way
South Jordan, UT 84095

Linda Hume
13962 Maple Hollow Circle
Draper, UT 84020

Dan Galli
11763 Chalk Creek Way
South Jordan, UT 84095

Rusty Bentley
11537 S Lizzie Cove
South Jordan, UT 84095

Steve Barnes
4268 W. 11430 S.
South Jordan, UT 84095

ARTICLE IX LIMITATIONS OF LIABILITY

The directors, officers and employees of the corporation shall not be personally liable in those capacities for the acts, debts, liabilities or obligations of the corporation.

**ARTICLE X
BYLAWS**

Provisions for the regulation and management of the internal affairs of the corporation shall be set forth in the Bylaws.

**ARTICLE XI
AMENDMENT OF ARTICLES OF INCORPORATION**

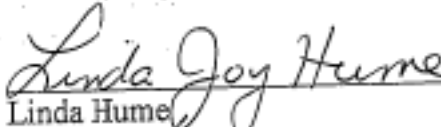
These Articles of Incorporation may be amended at any time in any manner which is permissible under the laws of the State of Utah; provided, however, that these Articles of Incorporation shall in no event be amended in any manner so as to change this corporation from a nonprofit corporation to a corporation organized or operated for pecuniary profit; nor shall the Articles of Incorporation be amended so as to make the purposes of the corporation inconsistent with the purposes as specified in Article III herein.

**ARTICLE XII
DISSOLUTION**

This corporation does not contemplate pecuniary gain or profit to the directors thereof, and it is organized solely for nonprofit purposes. In accordance with Utah Code Annotated Sections 53A-1a-517 and 53A-1a-510.5, upon the winding up and dissolution of the corporation, assets held pursuant to written conditions or limitations must be disposed of in accordance therewith. Upon the winding up and dissolution of this corporation, after paying or adequately providing for the debts and obligations of the corporation, the remaining assets shall be distributed to the Utah Charter School Board, a governmental body established pursuant to Utah Code Annotated Section 53A-1a-501 for a public purpose. Any funds or assets not so disposed of shall be disposed of by the district court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations as said court shall determine that are organized and operated exclusively for such purposes. The corporation itself is liable for its own debts; Neither the Utah Charter School Board, nor the State of Utah, or any subdivision thereof, is liable for the debts or financial obligations of the corporation or persons or entities that are agents or employees of the corporation.

In Witness Whereof, the undersigned have executed these Articles of Incorporation in duplicate this 3rd day of February 2012, and say: That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; that they all agree to be incorporators and board members; that they know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.


Angie Johnson


Linda Hume

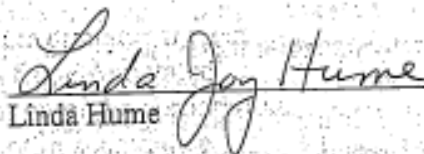

Dan Gall


Rusty Bentley


Steve Barnes

ACKNOWLEDGMENT BY REGISTERED AGENT

The undersigned, **LINDA HUME** being first duly sworn on oath deposes and says that he is the person appointed as the Registered Agent of **MOUNTAIN WEST MONTESSORI ACADEMY, INC.** and that he does hereby acknowledge and accept such appointment.


Linda Hume

Bylaws

MOUNTAIN WEST MONTESSORI ACADEMY, INC. BYLAWS

ARTICLE I Name & Purpose

SECTION 1.1: Name. The name of the organization is **Mountain West Montessori Academy, Inc.** (the “corporation”).

SECTION 1.2: Purpose. The corporation was formed to manage, operate, guide, direct and promote a Utah Public Charter School. The corporation is organized under the Utah Revised Nonprofit Corporation Act (the “Act”) for public purposes and is not organized for the private gain of any person.

ARTICLE II Members

SECTION 2.1: No Members. The corporation shall have no members. Any action which would otherwise by law require approval by a majority of all members or approval by the members shall require only approval of the Board. All rights which would otherwise by law vest in the members shall vest in the board.

ARTICLE III Meetings of Directors

SECTION 3.1: Annual Meeting. The Board of Directors of the corporation (the “Board”) shall hold an annual meeting for the purposes of organization, selection of Directors and officers, and the transaction of other business.

SECTION 3.2: Regular Meetings. Regular meetings will be held as often as the Board determines is appropriate. Regular meetings of the Board, including the annual meeting, shall be held on such dates and at such times and places as may be from time to time fixed by the Board.

SECTION 3.3: Special Meetings. Special meetings of the Board for any purpose(s) may be called at any time by the President of the Board, the Secretary, or one-third of the members of the Board.

SECTION 3.4: Notice. Special meetings of the Board and regular meetings that are held other than at the regularly scheduled time or place may be held only after each Director has received twenty-four (24) hours’ notice given personally or by telephone, e-mail or other similar means of communication.

ARTICLE IV Board of Directors – Officers

SECTION 4.1: General Powers. Subject to the limitations of the Act, the corporation’s Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may delegate the management of the corporation’s activities to any person(s), company or committees, however composed, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall

be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may, subject to contractual obligations as may exist, rescind any such assignment, referral or delegation at any time.

SECTION 4.2: Specific Powers. Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

4.2.1: To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; and to fix their compensation;

4.2.2: To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefore which are not inconsistent with the law, the corporation's Articles of Incorporation or these Bylaws, as it deems best;

4.2.3: To adopt, make and use a corporate seal and to alter the form of the seal from time to time, as it deems best;

4.2.4: To borrow money and incur indebtedness for the purpose of the corporation, and to cause to be executed and delivered therefore, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecations and other evidences of debt and securities therefore;

4.2.5: To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust;

4.2.6: To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property;

4.2.7: To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose; and

4.2.8: To carry out such other duties as are described in the Charter.

SECTION 4.3: Board Role, Size, Composition. The Board is responsible for overall policy and direction of the school and delegates responsibility for day-to-day operations to the Director/Principal and committees established by the Board. The Board shall consist of no fewer than five (5) and no more than seven (7) members. Directors shall receive no compensation other than reasonable expenses.

SECTION 4.4: Quorum. A quorum consists of a majority of the current Directors. Every act or decision done or made requires a majority vote of the Directors present at a meeting duly held at which a quorum is present. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Directors, if any action taken is approved by at least a majority of the required quorum for such meeting. Notwithstanding the foregoing, the provisions of Utah Code § 16-6a-825 shall apply.

SECTION 4.5: Terms. The initial Directors shall serve staggered terms as determined by the Board. All subsequent Directors shall serve three (3) year terms and are eligible for re-election.

SECTION 4.6: Resignation & Removal. Resignation from the Board must be in writing and received by the Secretary. The resignation is effective upon receipt or at the time specified in the writing. If the resignation is effective at a future time, a successor may be selected before such time, to take office when the resignation becomes effective. A Board Member may be removed with or without cause by the vote of two-thirds (2/3) of the remaining directors.

SECTION 4.7: Vacancies. Vacancies on the Board will exist: (1) on the death, resignation, or removal of any Director; or (2) when the term of a current Director has expired. A Director elected to fill a vacancy created by the death, resignation, or removal of a Director shall be elected to fill the unexpired term of his/her predecessor in office.

SECTION 4.8: Board Elections. In order to fill a vacancy in the Board, the Board will solicit applications from the school community or members of the community at large. The Board may then elect a candidate to fill the vacancy. Directors will be elected by the vote of a majority of the remaining members of the Board. Directors elected to fill the seats of directors whose terms have expired shall be elected at the annual meeting of the Board of Directors.

SECTION 4.9: Fees and Compensation. Directors shall not receive compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the corporation's business.

SECTION 4.10: Standard of Care.

4.10.1 A Director shall perform all duties of a Director in good faith, in a manner such Director believes to be in the best interests of the corporation and with such care, including the duty to make reasonable inquiries, as an ordinarily prudent person in a like situation would use under similar circumstances.

4.10.2 In performing the duties of a Director, a Director may rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by: (i) one or more officers or employees of the corporation whom the Director believes to be reliable and competent in the matters presented; (ii) legal counsel, independent accountants or other persons as to matters that the Director believes to be within such person's professional or expert competence; or (iii) a committee of the Board upon which the Director does not serve as to matters within a designated authority, provided the Director believes that the committee merits confidence and the Director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

ARTICLE V
Officers

SECTION 5.1: Officers. The officers of the corporation shall be President, Secretary, and Treasurer. All officers must be Directors of the corporation. The corporation may also have, at the discretion of the Board, one or more Vice Presidents, one or more Assistant Secretaries, one or more

Assistant Treasurers, and such other officers as may be elected or appointed. Any number of offices may be held by the same person.

SECTION 5.2: Election. The officers of the corporation shall be chosen at the annual meeting of the Board by and shall serve at the pleasure of the Board and shall hold their respective offices until their resignation, removal or other disqualification from service, or until their respective successors shall be elected.

SECTION 5.3: Subordinate Officers. The Board may elect, and may empower the President to appoint, such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in these Bylaws or as the Board may from time to time determine.

SECTION 5.4: Removal. Any officer may be removed, either with or without cause, by the Board at any time.

SECTION 5.5: Resignation. Any officer may resign at any time by giving written notice to the Board; such resignation may not prejudice the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the receipt of such notice or at any later time specified therein; the acceptance of such resignation shall not be necessary to make it effective.

SECTION 5.6: Vacancies. A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular election to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

SECTION 5.7: President. The President shall preside at all meetings of the Board and shall exercise such powers and duties as the Board may prescribe from time to time.

SECTION 5.8: Vice Presidents. In the absence or disability of the President, the Vice President(s), if any are appointed shall, in order of their ranks as fixed by the Board or, if not ranked, the Vice President designated by the Board, perform all duties of the President and, when so acting, shall have all the powers of, and subject to all the restrictions upon, the President. The Vice President(s) shall have such other powers and perform such other duties as the Board may prescribe from time to time.

SECTION 5.9: Secretary. The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board including the following information for all such meetings: the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of those present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, at the principal office in the State of Utah, the original or a copy of the corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all directors and their respective addresses.

SECTION 5.10: Treasurer. The Treasurer of the corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Director. The Treasurer shall deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the corporation with such depositaries as may be designated from time to time by the Board. The Treasurer shall disburse, or cause

to be disbursed, the funds of the corporation as may be ordered by the Board, and shall render, or cause to be rendered, to the Directors, upon request, an account of all transactions as Secretary or President and of the financial condition of the corporation. The Treasurer shall have such powers and perform such other duties as may be prescribed from time to time by the Board.

ARTICLE VI Indemnification

SECTION 6.1: Indemnification of Directors and Corporation Agents. The corporation hereby declares that any person who serves at its request as a Director, officer, employee, or member of any committee, or on behalf of the organization as a trustee, Director, or officer of another organization, whether for profit or not for profit, shall be deemed the corporation's agent for the purposes of this Article and to the extent allowed by law, shall be indemnified by the corporation against expenses (including attorney's fees), judgment, fines, excise taxes, and amounts paid in settlement actually and reasonably incurred by such person who was or is a party or threatened to be made a party to any threatened, pending, or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative by reason of such service, provided such person acted in good faith and in a manner he reasonably believed to be in the best interest of the corporation and, with respect to any criminal action or proceedings, had no reasonable cause to believe his conduct was unlawful. Except as provided in Article VI, Section 3, below, termination of such action, suit, or proceeding by judgment, order, settlement, conviction, or upon a plea of nolo contendere or its equivalent, shall not of itself create either a presumption that such person did not act in good faith and in a manner which he reasonably believed to be in the best interest of the corporation or, with respect to any criminal action or proceeding, a presumption that such person had reasonable cause to believe that his conduct was unlawful.

SECTION 6.2: Indemnification Against Liability to the Corporation. No indemnification shall be made with respect to any claim, issue, or matter as to which a person covered by Article VI, Section 6.1. shall have been adjudged to be liable for negligence or misconduct in the performance of his/her duty to the corporation unless and only to the extent that the court in which such action, suit, or proceeding was brought shall determine upon application that, despite the adjudication of the liability, but in view of all the circumstances of a case, such person is fairly and reasonably entitled to indemnification for such expenses which such court deems proper.

SECTION 6.3: Indemnification of Criminal Actions. No indemnification shall be made in respect of any criminal action or proceeding as to which a person covered in Article VI, Section 6.1. shall have been adjudged to be guilty unless and only to the extent that the court in which such action or proceeding was brought shall determine upon application that, despite the adjudication of guilt, but in view of all the circumstances of the case, such person is entitled to indemnification for such expenses, or fines which such court shall deem proper.

SECTION 6.4: Period of Indemnification. Any indemnification pursuant to this Article shall: (a) be applicable to acts or omissions which occurred prior to the adoption of this Article, and (b) continue as to any indemnified party who has ceased to be a Director, officer, employee, or agent of the corporation and shall inure to the benefit of the heirs and personal representatives of such indemnified party. The repeal or amendment of all or any portion of these Bylaws which would have the effect of limiting, qualifying, restricting any of the powers or rights of indemnification provided or permitted in this Article shall not solely by reason of such repeal or amendment, eliminate, restrict, or otherwise affect the right or power of the corporation to indemnify any person, or affect any right of indemnification of such person, with respect to any acts or omissions which occurred prior to such repeal or amendment.

SECTION 6.5: Advances of Costs and Expenses. The corporation may pay costs and expenses incurred by a Director, officer, employee or agent in defending a civil or criminal action, suit or proceeding, in advance of the final disposition of the action, suit or proceeding upon receipt of an undertaking by or on behalf of the person that he or she shall repay the amount advanced if it is ultimately determined that he or she is not entitled to be indemnified by the corporation as authorized by these Bylaws.

SECTION 6.6: Personal Liabilities of Directors and Officers. No Director or officer of the corporation shall be personally liable to the corporation for civil claims arising from acts or omissions made in the performance of his or her duties as a Director or officer, unless the acts or omissions are the result of his or her fraud, or malicious or willful misconduct, or the illegal use of alcohol or a controlled substance.

ARTICLE VII
Amendments

SECTION 7.1: These Bylaws may be amended when necessary by the vote of a majority of the Board.

IN WITNESS WHEREOF, the undersigned have executed these Bylaws this **2nd day of March 2012.**

DIRECTORS:


Angie Johnson


Linda Hume


Dan Galli


Rusty Bentley


Steve Barnes

Articles of Incorporation & Bylaws Minutes

Mountain West Montessori Academy
Governing Board of Directors

Friday, March 2, 2012

Location: 10672 South Redwood Road
South Jordan, UT 84095

Board Members Present: Angie Johnson, Linda Hume, Dan Galli, Rusty Bentley

MINUTES

4:30 PM – CALL TO ORDER by Angie Johnson

VOTING ITEMS

- Linda Hume moved to approve the Articles of Incorporation;
Rusty Bentley seconded the motion.
Motion passed unanimously.

- Dan Galli moved to approve the Bylaws;
Linda Hume seconded the motion.
Motion passed unanimously.

- Linda Hume moved to elect the below officers;
Dan Galli seconded the motion.
Motion passed unanimously.
 - President – Angie Johnson
 - Vice-President – Steve Barnes
 - Vice-President – Dan Galli
 - Secretary – Rusty Bentley
 - Financial Coordinator – Linda Hume

ADJOURN

- Rusty Bentley moved to adjourn the Board Meeting;
Linda Hume seconded the motion.
Motion passed unanimously.

4:34 PM - ADJOURNED

Indicator – Board performance & stewardship

Measure	Metric	Board Goal
Board Member development	Percentage of board passing all available board training modules on the State Charter School Board website	100%
Regulatory and reporting compliance	Percentage of all required reports that are submitted to state agency complete, accurate, and on time	100%
Regulatory and reporting compliance	Articles of Incorporation, Board Bylaws, and Charter are all in agreement and the school's Charter is not changed without proper amendment from chartering entity	100%

Comprehensive Program of Instruction

Educational Program

Founded upon Montessori philosophy, the mission of Mountain West Montessori Academy is to facilitate student-centered learning and intellectual curiosity through an individualized and interdisciplinary curriculum, hands-on experience, and community involvement.

Mountain West Montessori Academy Mission Statement

In support of our mission, Mountain West Montessori Academy (MWMA) will implement an educational program based on the work of Dr. Maria Montessori. The application of Dr. Montessori's educational philosophy is well established worldwide, and research has demonstrated superior outcomes for Montessori students, independent of parental influence, both academically and socially (Lillard & Else-Quest, 2006). Montessori education can serve the needs of students of all income levels, cultural backgrounds, and academic abilities; therefore, MWMA will target a broad population of students including Gifted/Talented, ELL, and Special Education students. Our vision is to bring the benefits of Montessori education to a wider group of children in Utah, producing graduates who possess the confidence, clarity, and compassion to improve our world.

Student-Centered Learning

Montessori philosophy emphasizes a guided-discovery approach to learning in which students' interactions with the environment build cognitively upon their prior knowledge to facilitate the acquisition of new information. MWMA's classrooms will contain an extensive sequence of manipulative materials, lessons, and hands-on activities progressing from concrete explorations to more abstract projects and research materials as students advance through the program. Our students will have the opportunity to develop autonomy and increase their engagement in the learning process by exercising choices within this framework of carefully chosen options in the prepared classroom environment (Reeve & Tseng, 2011). Research indicates that this approach has a positive effect on students' motivation and quality of experience (Rathunde & Csikszentmihalyi, 2005). Furthermore, elementary students will have the opportunity to focus and persevere in their core studies during an uninterrupted, literacy-based three-hour work time each morning. This block of time is a central tenet of the Montessori philosophy.

Differentiated Curriculum to Meet Individual Needs

The Montessori curriculum provides an individualized education for each student, addressing a diverse community of learners. Individual and small group lessons are presented and students can progress through the material to mastery level through practice. The Montessori curriculum

encompasses Language Arts, Mathematics, Science, Social Studies, and peace education, inclusive of interpersonal skills such as conflict resolution. Student academic goals for the year will be established and reviewed during Parent-Teacher Conferences, and individual progress will be charted through a computer-based record-keeping system. This will allow teachers to assist students in reflecting on their progress and making decisions on their Work Plans in support of these goals. The Montessori curriculum lends itself to curriculum-based formative assessment, which allows teachers to more quickly identify any problem areas and differentiate instruction to accommodate different learning styles, pacing, and needs. Individualized learning and differentiated instruction are key tenets of the Montessori philosophy that have been shown to positively correlate with student success and satisfaction (Tomlinson, 2000).

Interdisciplinary Curriculum

Montessori curriculum is designed to highlight the connections between disciplines, teach big picture concepts through narrative lessons, and use authentic contexts and real-life situations to encourage transfer and application of knowledge. This supports the implementation of the Utah Core Curriculum standards, which aim to increase graduates' level of college and career readiness. Curriculum integration encourages the critical thinking and problem-solving skills endorsed by these standards (Terenzini, Springer, Pascarella & Nora, 1995). Research has indicated that Montessori students, "tested better [than the control group] on 'executive function,' the ability to adapt to changing and more complex problems, an indicator of future school and life success" (Lillard, 2006).

Hands-on Experience

MWMA's program will employ extensive use of manipulatives, student-created materials, and authentic experiences. For example, students will use manipulatives to model mathematical problems and concepts in concrete ways to build good number sense, geometric, and computational skills, laying the framework for problem solving ability. Science lessons contain multiple elements of hands-on activity and experimentation. For example, one typical Montessori botany lesson involves a teacher illustrating the parts of a flower, the students creating a book that highlights each part and its function, and the "dissection" of a real flower with identification of the parts. In addition, field trips are an important part of the curriculum, allowing children to adapt their classroom learning to real world situations and broaden the context of their knowledge.

Community Involvement

MWMA takes a holistic approach to education, placing importance on personal and social growth as well as academic achievement. Our program will reflect Dr. Montessori's Peace Education curriculum, for which she received a Nobel Peace Prize nomination. Students will practice conflict resolution skills in the classroom. Grace and courtesy, coupled with respect

toward others, will be modeled and expected. Classrooms will be composed of mixed ages, allowing a greater range of social interaction in the classroom community, as well as peer tutoring opportunities and skill reinforcement. Research has demonstrated that mixed-age classrooms have a significant positive effect on children’s pro-social behavior (McClellan & Kinsey, 1999). Students will additionally have the opportunity to expand their involvement to the local community through field trips and service projects. MWMA’s Junior High program will include a field trip rotation, which cycles through nature-based, service learning-based, and academically based excursions, both local and further afield.

Summary

Mountain West Montessori Academy will implement the Montessori philosophy of education to provide an inclusive and individualized program of instruction to a wide range of diverse learners. In doing so, we hope to create a school culture of respect and success in both academic endeavors and social interactions. Our aspiration is for our students to have curiosity about the world around them, the literacy and reasoning skills to satisfy that curiosity, and a love for school and for learning. As Dr. Montessori pointed out, “One test of the correctness of educational procedure is the happiness of the child.”

Supplemental Curriculum: Meeting the Needs of All Students

MWMA’s rubric for selecting supplementary curriculum will be based on scientific research, adaptability to differentiation, financial feasibility, and skill-orientation rather than grade orientation. Supplemental curriculum will align with Montessori philosophy and integrate with Montessori curriculum, which encompasses language, math, science, and social studies. Plans for identification of special populations and a discussion of possible strategies to meet the needs of all students within a special population may be found in **Section 2**, in addition to the discussion below.

Students Below Benchmark

Students who score below benchmark on a research-based reading assessment, such as DIBELS, will receive interventions provided by supplementary curriculum supports, such as work with a reading specialist or work with research-based reading intervention programs such as Wilson Language Training. Academic deficiencies in any area, as determined by assessment (see assessment, **Section D**), will be addressed by additional instruction, which may be provided individually or in small groups of similar ability by teachers, paraprofessionals, parents, or specialists. Supplemental curriculum materials to support interventions in reading and math will meet the criteria outlined in the selection rubric, and MWMA will keep abreast of current research-based programs designed for both remediation and acceleration. Teachers will provide

parents with information to reinforce this instruction at home. Students who do not respond to these interventions will be referred to Special Education.

Special Education Students

Special Education students will be served at Mountain West Montessori Academy by a team consisting of general and special education teachers, parents, and administration working together to design instruction and develop student IEPs. Students with disabilities will receive supplemental curriculum materials appropriate to meet the IEP goals. A detailed discussion of evaluation, eligibility, and other areas pertaining to special education can be found in **Section 17**.

Gifted and Talented Students

Mountain West Montessori Academy will serve the needs of academically Gifted/Talented students through differentiated curriculum and mixed-age classrooms. Multi-age classroom grouping allows every student to work at his or her own pace. We strongly feel that every student should be challenged at his or her own level. MWMA will use the guidelines established by the USOE as outlined in the Utah Gifted and Talented Handbook (Hunsaker, Erwin, Pack & Odoardi, 2008) to identify and meet the needs of students exhibiting diverse talents, abilities, or strengths.

Junior High students will have the opportunity to participate in Honors/Accelerated work or Advanced Placement classes as appropriate. In addition, Junior High students will be offered electives in areas such as physical education, the arts, foreign languages, and home economics according to teacher talents and funding availability for specialists. MWMA's guidelines for providing secondary elective courses will follow the Montessori tenets of student choice, attention to the whole person, and development of independence.

English Language Learner Students

MWMA will include a home language survey in registration materials to identify English Language Learners (ELLs). Language acquisition help will be provided as needed. The Montessori emphasis on hands-on activities and manipulatives additionally assists English Language Learners.

Methods of Instruction

In keeping with Montessori best practices, MWMA's classrooms will be structured as follows:

<i>Early Childhood:</i>	<i>Kindergarten</i>
<i>Elementary I:</i>	<i>1st-3rd Grade</i>
<i>Elementary II:</i>	<i>4th-6th Grade</i>
<i>Junior High:</i>	<i>7th-9th Grade</i>

Each elementary classroom will contain approximately 25 students, one teacher, and one paraprofessional. This ratio will be slightly higher in Junior High to accommodate scheduling. Junior High students will often be grouped in interdisciplinary “houses” with teachers who are specialists in their subject providing core-specific curriculum with the help of paraprofessionals. MWMA’s secondary school (7-9) teachers will have the appropriate license to teach their subject matter within the interdisciplinary groups/houses. MWMA’s elementary students will remain with their teachers and peers for a three-year period, maximizing learning time, mentoring opportunities and the teachers’ ability to know the students well and address their specific learning needs.

MWMA elementary students will have an uninterrupted morning work period. This three-hour block will be literacy-based, integrating core subjects. Instruction will be in individual or small group lessons, with emphasis placed on a model of individual instruction, practice, and mastery. Students will make use of a variety of specially developed materials that use concrete models, self-directed activity, and teacher and peer interaction to build concepts. As students transition to Elementary II, they may begin to rely less upon concrete materials as learning objectives become more abstract, and more on self directed activities guided by the teacher. At the Junior High level, students participate in interdisciplinary projects, research, and field experiences, employing more abstract thinking skills and using textbook resources. In elementary classes, the afternoon will include lunch, recess, and time for cooperative learning activities in larger groups where core subjects such as science and social studies will be project-based, including science labs and experiments. Our goal, based on financial feasibility and teacher certification, is to have subject specialists offer courses in foreign language and technology as students become acculturated to the Montessori philosophy.

MWMA teachers will use the following research-based instructional approaches: inquiry learning, self-directed learning, cooperative/collaborative learning, and direct instruction. Montessori curriculum is designed for individual or small group direct instruction lessons coupled with individual student exploration and cooperative projects. Whole group direct instruction will occupy a minority of instructional time.

MWMA’s instructional model will uniquely serve a variety of student needs. Individual and small group lessons allow teachers to address a broad spectrum of learner abilities while maintaining high expectations of all students. For example, an elementary student might start the day by looking at his work plan for the week and choosing to work with the division board, a Montessori material that concretely models division. He may choose to work at a table or on the floor, using a mat. After working several problems on the board and recording and checking his work, he may give his name card to his teacher or move his name on a magnet board to indicate his readiness to have the teacher evaluate his work. When his teacher comes over, he may demonstrate his division board work to her. She may give him a slightly more challenging

problem to work, perhaps with a remainder, to assess what he will do, or if he is ready she may invite him to join her with another student in a lesson on the two-digit division process. Another student in the same class may have worked with the same materials on a different level, worked with entirely different materials, or completed mathematics work on a much higher or lower level with a more or less in-depth activity. In this way a wide range of student levels of readiness, interest, and learning style are addressed in one classroom.

At the elementary level, MWMA will take a studio approach to instruction in physical education, art, and music. “Studio arts” refer to classes in which the students learn techniques and have the hands-on materials to practice, create, and perform what they learn. These courses will occur on Fridays in a three-hour block. Elementary II students will be able to select from a menu of choices in each area, and rotate through classes. Course offerings will be based on both the unique talents of the teachers and specialists brought in from the community. We intend to offer physical education choices such as dance, martial arts, and sports, art choices, music choices, and ORFF (an educational method combining movement, music, and drama). Elementary I level students will remain with their classmates and at least one of their teachers during studio arts, while Elementary II level students will intermingle with students from other classes and experience new teachers. This is a developmentally-appropriate approach to strengthening the school community.

Field trips and experiential learning will be an important part of the MWMA curriculum. Emphasis will be placed on connections between field experiences and classroom learning. The concept of field experiences will be expansive and may include physical and virtual expeditions, walking-distance expeditions, bus-based trips, service-learning activities, and internet-based long-distance collaborations. Our goal is that Elementary I students participate in learning experiences outside the classroom once every month, Elementary II students twice per month, and Junior High students three times per month or more. Junior High students will also have the opportunity to plan and execute fundraising activities to allow them to participate in longer trips that are further afield. Field trips provide integration and application of classroom learning.

Elementary Schools (K-6)

Our nationally accredited Montessori curriculum will support the Utah Core Curriculum standards. MWMA will use an established computer based record keeping system to plan, record, and report ongoing student progress, based on student goals correlated with the Utah Core Curricula objectives. Formative assessment in the form of informal oral, written, and demonstration assessment and teacher observation will occur during class, with teachers recording student practice and/or mastery in the system. Current computer based Montessori record keeping systems outline each skill within a concept, for example in math the objective

“ability to carry forward” would be specified within the skill of division. This extensive record-keeping by the teacher allows for formative assessment on a daily basis.

Many of the Montessori materials lend themselves to assessment, based on the way in which students work with them. For example, a grammar exercise may require a student to place cards with proper and common nouns on them in columns to categorize them as such—enabling the teacher to see at a glance the level at which the student understands the concept.

Mastery on curriculum-based assessments will be demonstrated at approximately a 90% success level, with special education students’ goals and mastery determined by IEP. Summative authentic assessment techniques such as student portfolios, projects, essays, and performances will be emphasized, with objective curriculum-based assessments used more occasionally, but with increasing frequency as grade level increases.

In addition to curriculum-based assessment, MWMA will use standardized testing such as DIBELS or the Gates-MacGinitie Reading Test to assess the reading and math levels of elementary students a minimum of twice each year. Data will be used to track student progress, assess and improve remediation and extension programs, and fine-tune classroom instructional practices.

MWMA will conduct all Utah Comprehensive Accountability System (UCAS) assessments as outlined on the USOE assessment website. Use of programs such as the Utah Write Formative Writing Assessment program to provide feedback on writing skills will help prepare all students for summative testing. UTIPS will be used to practice test-taking skills and comprehension of state standards.

Secondary Schools (7-9)

MWMA will address the standards of the USOE core curriculum while integrating ideas and concepts across subjects. For example, a history class may join with a language arts class in creating a narrative writing piece on an aspect of the Civil War, or a mathematics class may work with a science class to complete a project on exponential bacterial growth. MWMA recognizes that the following course catalog will be revised as USOE requirements change and MWMA elective courses reflect student interest and staff certifications. Additionally, the current Northwest Accreditation Commission (NWAC) standards will be the AdvancED Standards for Quality for the 2014-2015 school year but are still referred to as NWAC throughout this course catalog.

Course Catalog

Listed below are the USOE secondary core required courses. MWMA meets and exceeds these requirements. MWMA will meet the fine arts seventh and eighth grade requirements through elective offerings.

State Requirements 7 th & 8 th Grade	
Language Arts	2.0
Mathematics	2.0
Science	1.5
Social Studies	1.5
The Arts	1.0
Physical Education	1.0
Health Education	0.5
Career & Technical Education	1.0
Electives	1.5
Total Required Credits:	12.0

MWMA Requirements 7 th & 8 th Grade	
Language Arts	2.0
Mathematics	2.0
Science	2.0
Social Studies	2.0
The Arts (Elective Offerings)	1.0
Physical Education	1.0
Health Education	0.5
Career & Technical Education	1.0
Electives	2.5
Total Required Credits	14.0

State Requirements 9 th Grade	
Language Arts	1.0
Mathematics	1.0
Science	1.0
Social Studies	1.0
The Arts	0.5
Physical Education	0.5
Health Education	0.5
Electives	0.5
Total Required Credits:	6.0

MWMA Requirements 9 th Grade	
Language Arts	1.0
Mathematics	1.0
Science	1.0
Social Studies	1.0
The Arts (Elective Offerings)	0.5
Physical Education	0.5
Health Education	0.5
Electives	1.5
Total Required Credits	7.0

Listed below are the USOE secondary core required courses. MWMA meets and exceeds these requirements. MWMA will meet the fine arts seventh and eighth grade requirements through elective offerings.

Language Arts

The Language Arts Montessori Curriculum aligned to the Utah Core Curriculum will meet the MWMA mission to *foster intellectual curiosity and facilitate student-centered learning*. Montessori curriculum seeks to teach students to value reading and writing. Students will read and write in a wide range of genres for a variety of authentic purposes and learn to communicate to a variety of audiences. Vocabulary and etymology is presented across the curriculum. Grammar will be studied daily within the context of literature and writing. There will be a special emphasis on critical analysis; students practice daily a variety of types of writing in response to literature.

These courses may explore a variety of literary traditions by querying history, identity, and expression throughout the world's literary offerings. By engaging with a variety of genres, styles, and themes, we aim to open students' eyes to the multitude of literary works and provoke them to question canonical works in a fresh way. Additionally, texts are viewed from a writer's perspective, and emphasis is placed on students becoming lifelong writers who initiate writing in their own lives for a variety of purposes and audiences. Within these writing studies, students are guided through cyclical and revision-focused writing processes and participation in book groups.

The MWMA Philosophy correlates with the overriding principals of the Utah Core Curriculum to become college and career ready; students must grapple with works of exceptional craft and thought whose range extends across genres, cultures, and centuries. Such works offer profound insights into the human condition and serve as models for students' own thinking and writing. Along with high-quality contemporary works, these texts should be chosen from among seminal U.S. documents, the classics of American literature, and the timeless dramas of Shakespeare. Through wide and deep reading of literature and literary nonfiction of steadily increasing sophistication, students gain a reservoir of literary and cultural knowledge, references, and images; the ability to evaluate intricate arguments; and the capacity to surmount the challenges posed by complex texts.

Language Arts 7
Required, 1.0 Credit

This course is designed to emphasize reading comprehension, writing, and methods of inquiry as found in the core. The course will focus on the processes, skills, and strategies for effective communication in all its forms. In this class, students continue to practice and refine language skills (i.e. reading, writing, speaking, and listening). Writing process skills include the descriptive, narrative, informative, and persuasive modes for specific audiences.

Various reading sources help students refine decoding and interpretation skills. Students will write for different purposes and audiences.

Language Arts 7 focuses on the grade level's six (6) strands and incorporates the four (4) Text Exemplars listed below:

Strands:

1. Reading Literature
2. Reading Informational Text
3. Reading Foundational Skills
4. Writing
5. Speaking and Listening
6. Language

Text Exemplars:

1. Stories, Drama, Poetry (followed by Sample Performance Tasks)
2. Informational Texts: English Language Arts (followed by Sample Performance Tasks)
3. Informational Texts: History/Social Studies
4. Informational Texts: Science, Mathematics, and Technical Subjects

Language Arts 8
Required, 1.0 Credit
Prerequisite: Language Arts 7

This course is designed to emphasize reading comprehension, writing, and methods of inquiry as found in the core. The course will focus on the processes, skills, and strategies for effective communication in all its forms. In this class, students continue to practice and refine language skills (i.e. reading, writing, speaking, and listening). Writing process skills include the descriptive, narrative, informative, and persuasive modes for specific audiences.

Various reading sources help students refine decoding and interpretation skills. Students will write for different purposes and audiences.

Language Arts 8 focuses on the grade level's six (6) strands and incorporates the four (4) Text Exemplars listed below:

Strands:

1. Reading Literature
2. Reading Informational Text
3. Reading Foundational Skills
4. Writing
5. Speaking and Listening
6. Language

Text Exemplars:

1. Stories, Drama, Poetry (followed by Sample Performance Tasks)
2. Informational Texts: English Language Arts (followed by Sample Performance Tasks)
3. Informational Texts: History/Social Studies
4. Informational Texts: Science, Mathematics, and Technical Subjects

Language Arts 9
Required, 1.0 Credit
Prerequisite: Language Arts 8

In this class, students continue to practice and refine language skills (i.e. reading, writing, speaking, and listening). Writing process skills include the descriptive, narrative, informative, and persuasive modes for specific audiences. Investigative research processes are taught, and cross-curricular research essays are developed. Reading materials include novels, poetry, short stories, classical drama, classical mythology, and reference materials.

This course is designed to emphasize reading comprehension, writing, and methods of inquiry as found in the core. The course will focus on the processes, skills, and strategies for effective communication in all its forms.

Language Arts 9 focuses on the grade level's six (6) strands and incorporates the four (4) Text Exemplars listed below:

Strands:

1. Reading Literature
2. Reading Informational Text
3. Reading Foundational Skills
4. Writing
5. Speaking and Listening
6. Language

Text Exemplars:

1. Stories, Drama, Poetry (followed by Sample Performance Tasks)
2. Informational Texts: English Language Arts (followed by Sample Performance Tasks)
3. Informational Texts: History/Social Studies
Informational Texts: Science, Mathematics,
and Technical Subjects (followed by Sample Performance Tasks)

Mathematics

Junior High mathematics courses will expand on the foundation of elementary students' use of Montessori didactic materials, which cultivate concrete understanding of arithmetic, geometric, and algebraic concepts in preparation for abstract application. The use of the Montessori methodology throughout mathematics ensures that concepts are not memorized, but understood. The students will have guiding questions, take quizzes for feedback, and master comprehensive exams. Throughout the mathematics curriculum, concepts taught will be applied to real-world situations.

Mathematics 7 Required, 1.0 Credit

In 7th Grade Mathematics students will focus on developing understanding of and applying proportional relationships; developing understanding of operations with rational numbers and working with expressions and linear equations; solving problems involving scale drawings and informal geometric constructions, and working with two- and three-dimensional shapes to solve problems involving area, surface area, and volume; and drawing inferences about populations based on samples.

The following mathematical practices will be used in the classroom:

Standard 1: Make sense of problems and persevere in solving them.

Standard 2: Reason abstractly and quantitatively.

Standard 3: Construct viable arguments and critique the reasoning of others.

Standard 4: Model with mathematics.

Standard 5: Use appropriate tools strategically.

Standard 6: Attend to precision.

Standard 7: Look for and make use of structure.

Standard 8: Look for and express regularity in repeated reasoning.

Mathematics 8 Required, 1.0 Credit Prerequisite: Mathematics 7

Students will focus on formulating and reasoning about expressions and equations, including modeling an association in bivariate data with a linear equation, solving linear equations and systems of linear equations; grasping the concepts of a function and describing quantitative relationships; analyzing dimensional space and figures using distance, angle, and congruence, and understanding/applying the Pythagorean theorem.

The following mathematical practices will be used in the classroom:

Standard 1: Make sense of problems and persevere in solving them.

Standard 2: Reason abstractly and quantitatively.

Standard 3: Construct viable arguments and critique the reasoning of others.

Standard 4: Model with mathematics.

Standard 5: Use appropriate tools strategically.

Standard 6: Attend to precision.

Standard 7: Look for and make use of structure.

Standard 8: Look for and express regularity in repeated reasoning.

Secondary Mathematics I

Required, 1.0 Credit

Prerequisite: Mathematics 8

Secondary Mathematics I improves math skill proficiency, expands the student's understanding of mathematical concepts and promotes critical and logical thinking. Topics include algebraic expressions and equations, integers and rational numbers, inequalities, monomials and radical expressions, polynomials, factoring, functions, graphs, lines and slopes, quadratics, and rational expressions.

This course focuses on deepening and extending understanding of linear relationships, in part by contrasting them with exponential phenomenon, and in part by applying linear models to data that exhibit a linear trend; and using properties and theorems involving congruent figures to deepen and extend understanding of geometric knowledge. Algebraic and geometric ideas are tied together. The focus is on mathematics as a coherent, useful, and logical subject, cultivating the ability to make sense of problem situations.

The following mathematical practices will be used in the classroom:

Standard 1: Make sense of problems and persevere in solving them.

Standard 2: Reason abstractly and quantitatively.

Standard 3: Construct viable arguments and critique the reasoning of others.

Standard 4: Model with mathematics.

Standard 5: Use appropriate tools strategically.

Standard 6: Attend to precision.

Standard 7: Look for and make use of structure.

Standard 8: Look for and express regularity in repeated reasoning.

Social Studies

Montessori students will learn how the contributions of humankind throughout history have created the world that they live in. Students will understand the interrelations between our physical and cultural worlds through the study of Utah History, US History, and Geography. Montessori Philosophy emphasizes cross-curricular literacy-based connections in line with the Utah State Office of Education ELA curriculum text exemplars, which include informational texts for history and social studies.

Utah Studies 7 Required, 1.0 Credit	
<p>Utah is a state diverse in landscape and people. This course is designed to help students understand Utah's present history, particularly emphasizing the periods of time in Utah from statehood to the present. Students will review the interaction between Utah's geography and its inhabitants, the formative contributions of Native Americans, explorers, and Utah pioneers, the relationships between government and the people of Utah, the many opportunities people have to make a living in Utah, the diverse nature of Utah's people and cultures, and the impact of contemporary events on the land and people of Utah. The Utah Studies Core is designed to meet the needs of a semester-length course. The scope and detail of this course will be expanded to meet specific needs.</p>	<p>Standard 1: Students will understand the interaction between Utah's geography and its inhabitants.</p> <p>Standard 2: Students will understand the contributions of Native American Indians, explorers, and Utah's pioneers.</p> <p>Standard 3: Students will understand the relationship between government and the people of Utah.</p> <p>Standard 4: Students will understand the diverse ways people make a living in Utah.</p> <p>Standard 5: Students will understand the diverse nature of Utah's peoples and cultures.</p> <p>Standard 6: Students will understand the impact of major contemporary events that concern the land and people of Utah.</p>
United States History 8 Required, 1.0 Credit Prerequisites: Utah Studies 7	
<p>United States History 8 covers events and issues from the Age of Exploration through Reconstruction and the western movement, emphasizing the 18th and 19th centuries. Topics covered will include, but are not limited to: exploration, colonization, the Revolutionary War, constitutional issues, nation building, the Civil War, Reconstruction, and the western movement. Standards 1 and 2 should be integrated throughout the course rather than taught independently. The remaining standards can be taught either chronologically or thematically. Although the emphasis of this course is on the 18th and 19th</p>	<p>Standard 1: Students will interpret the role of geography in shaping United States history.</p> <p>Standard 2: Students will investigate the relationship between events of different time periods.</p> <p>Standard 3: Students will understand the changes caused by European exploration in the Americas.</p> <p>Standard 4: Students will analyze European colonization and settlement of North America.</p> <p>Standard 5: Students will understand the</p>

centuries, additional content may be covered as time permits.

Understanding United States history is essential for the continuation of our democratic society. This course will help students make connections between their world and the rich heritage of United States history.

significance of the American Revolution in the development of the United States.

Standard 6: Students will understand the structure and function of the United States government established by the Constitution.

Standard 7: Students will explore the territorial growth of the United States before the Civil War.

Standard 8: Students will examine the expansion of the political system and social rights before the Civil War.

Standard 9: Students will understand the significance of the Civil War Era to the United States.

Standard 10: Students will understand the development of the American West following the Civil War.

Geography for Life 9
Required, 1.0 Credit
Prerequisite: US History

Geography is described as the study of the "why of the where." Geography for Life will explore how to use geography as a tool to better understand the world in which we live. Students will learn to evaluate and question the why and where of spatial perceptions that are read, seen, and heard. The six standards are best understood when using the following geographic themes: location, place, movement, region, and human-environmental interaction. The course will include map skills with physical and human geography essentials, beginning with North America, South America, Europe, and their connections to other world regions.

Standard 1: Students will understand the world in spatial terms.

Standard 2: Students will understand the human and physical characteristics of places and regions.

Standard 3: Students will understand how physical processes shape the earth's surface.

Standard 4: Students will understand how human activities shape the earth's surface.

Standard 5: Students will understand the interaction of physical and human systems.

Standard 6: Students will use geographic knowledge to connect to today's world

Science

In science, MWMA students will focus on asking crucial questions and looking for patterns. Students' natural curiosity will be stimulated through discovery projects and experiments. Students will develop hypotheses, create projects, and make presentations. Outdoor educational experiences and the use of scientific instruments will be part of this study to encourage the real-world application of science education.

Integrated Science 7 Required, 1.0 Credit

Seventh Grade Integrated Science focuses on the theme of "structure." Life, physical, and earth science contents are integrated in a core curriculum. The standards to be taught relate to matter, structure of earth's crust and interior, structure of cells and organisms, reproduction and heredity of organisms, and classification schemes.

Integrated Science 7 is a foundation course, which emphasizes basic science concepts with real-life applications. Topics include classification systems, cell genetics, ecology, the environment, and economics and the environment. Although this course focuses on life sciences, physical and earth science topics that deal with the structure and organization of the natural world have been included to help students to recognize the integrated nature of science.

Intended Learning Outcomes:

1. Use science process and thinking skills.
2. Manifest scientific attitudes and interests.
3. Demonstrate understanding of science concepts and principles.
4. Communicate effectively using science language and reasoning.
5. Demonstrate awareness of social and historical aspects of science.
6. Demonstrate understanding of the nature of science.

Standard 1: Students will understand the structure of matter.

Standard 2: Students will understand the relationship between properties of matter and Earth's structure.

Standard 3: Students will understand that the organs in an organism are made of cells that have structures and perform specific life functions.

Standard 4: Students will understand that offspring inherit traits that make them more or less suitable to survive in the environment.

Standard 5: Students will understand that structure is used to develop classification systems.

Integrated Science 8
Required, 1.0 Credit
Prerequisite: Integrated Science 7

Eighth Grade Integrated Science focuses on the theme of “change.” Physical, earth, and life science contents will be integrated into the core curriculum. The standards to be taught relate to observations of chemical and physical change, changes in biological energy, forces, energy and motion, constructing machines, and changes in the Earth’s crust and climate.

The Integrated Science core will be covered along with economics and the environment. This course introduces students to the theme of change and its influence on the environment. Because the course focuses on physical, earth and life sciences, students gain a clearer picture of relationships in the natural world. This hands-on course allows students to explore areas of particular interest.

Intended Learning Outcomes:

1. Use science process and thinking skills.
2. Manifest scientific attitudes and interests.
3. Demonstrate understanding of science concepts and principles.
4. Communicate effectively using science language and reasoning.
5. Demonstrate awareness of social and historical aspects of science.
6. Demonstrate understanding of the nature of science.

Standard 1: Students will understand the nature of changes in matter.

Standard 2: Students will understand that energy from sunlight is changed to chemical energy in plants, transfers between living organisms, and that changing the environment may alter the amount of energy provided to living organisms.

Standard 3: Students will understand the processes of rock and fossil formation.

Standard 4: Students will understand the relationships among energy, force, and motion.

Earth Systems 9
Required, 1.0 Credit
Prerequisite: Integrated Science 8

Earth Systems integrated science core focuses on "systems" as an organizing concept to understand life on Earth, physical, space, and life science contents. Using observable evidence, students will study interactions among earth systems. Earth Systems Science provides students with an understanding of how the parts of a system interact. The concept of matter cycling and energy flowing is used to help understand how systems on planet Earth are interrelated.

Earth Systems 9 provides students with knowledge and understanding about life on Earth, geological change, and the interaction of the atmosphere,

Standard 1: Students will understand the scientific evidence that supports theories that explain how the universe and solar system developed.

Standard 2: Students will understand that the features of Earth’s evolving environment affect living systems, and that life on Earth is unique in the solar system.

Standard 3: Students will understand that gravity, density, and convection move Earth’s plates and this movement causes the plates to impact other Earth systems.

Standard 4: Students will understand that water

hydrosphere, and biosphere.

Intended Learning Outcomes:

1. Use Science Process and Thinking Skills
2. Manifest Scientific Attitudes and Interests
3. Demonstrate Understanding of Science Concepts, Principles and Systems
4. Communicate Effectively Using Science Language and Reasoning
5. Demonstrate Awareness of Social and Historical Aspects of Science
6. Demonstrate Understanding of the Nature of Science

cycles through and between reservoirs in the hydrosphere and affects the other spheres of the Earth system.

Standard 5: Students will understand that Earth's atmosphere interacts with and is altered by the lithosphere, hydrosphere, and biosphere.

Standard 6: Students will understand the source and distribution of energy on Earth and its effects on Earth systems.

Healthy Lifestyles

The two-fold purpose of physical and health education in the Montessori Philosophy is to teach skills and to instill in students the prime importance of a healthy lifestyle.

Physical Education 7 Beginning Team Sports Activities Required, 0.5 Credit

Beginning Team Sports Activities is an entry-level course emphasizing beginner skills in a broad spectrum of activities in order to develop a foundation for future physical education classes. The course content is developmentally appropriate for seventh grade students who, in most instances, will be experiencing a formal physical education class for the first time.

Measures are taken to ensure the physical and emotional safety of all students. Equipment is inspected regularly and maintained in proper working condition, and facilities are kept clean and free from hazards. Activities are offered that are safe and developmentally appropriate. Enrollment numbers meet Northwest accreditation-limiting standards so that students are safely supervised, and the curriculum is effectively delivered. Students feel free to participate and explore without the fear of failure, harm, or ridicule.

Standard 1: Students will demonstrate competency in motor skills and movement patterns needed to perform a variety of physical activities.

Standard 2: Students will demonstrate understanding of movement concepts, principles, strategies, and tactics as they apply to the learning and performance of physical activities.

Standard 3: Students will participate regularly in physical activity.

Standard 4: Students will achieve and maintain health-enhancing levels of physical fitness.

Standard 5: Students will exhibit responsible personal and social behaviors that show respect for themselves and others in physical activity settings.

Standard 6: Students will value physical activity for health, enjoyment, challenge, self-expression, and/or social interaction.

Physical Education 8 Intermediate Activities Required, 0.5 Credit Prerequisite: Physical Education 7

Intermediate Activities offers a wide range of developmentally appropriate activities that are increasingly complex in content, concept, and skill development and execution. Students continue to practice skills in modified form but begin to participate in regulation games with more complex playing environments than those experienced in *Beginning Activities*. Teams are kept small, allowing maximum participation and involvement by all students. Cooperative as well as traditional sports activities are included in the curriculum. *Intermediate Activities* incorporates more in-depth instruction and application of the elements of physical fitness. Students begin to see the relationship between proper nutritional choices and

Standard 1: Students will demonstrate competency in motor skills and movement patterns needed to perform a variety of physical activities.

Standard 2: Students will demonstrate an understanding of movement concepts, principles, strategies, and tactics as they apply to the learning and performance of physical activities.

Standard 3: Students will participate regularly in physical activity.

Standard 4: Students will achieve and maintain health-enhancing levels of physical fitness.

physical activity for the maintenance of a lifelong healthy lifestyle. Activity journals are introduced as a means of tracking progress toward personal fitness goals and self-assessment.

Measures are taken to ensure the physical and emotional safety of all students. Equipment is inspected regularly and maintained in proper working condition, and facilities are kept clean and free from hazards. Activities are offered which are safe and developmentally appropriate, and enrollment numbers meet Northwest accreditation limiting standards so students are safely supervised, and the curriculum is effectively delivered.

Students feel free to participate and explore without the fear of failure, harm, or ridicule.

Standard 5: Students will exhibit responsible personal and social behaviors that show respect for themselves and others in physical activity settings.

Standard 6: Students will value physical activity for health, enjoyment, challenge, self-expression and/or social interaction.

Health Education I Required, 0.5 Credit

Health education provides opportunities for students to develop knowledge, skills, and attitudes necessary for practicing lifelong, health-enhancing behaviors. The Health I curriculum focuses on what students can do for themselves to meet the objectives of the six state core standards. Students will learn that they are responsible for their personal well-being and that building a solid foundation of health literacy and decision-making skills can contribute to a variety of healthy choices for self and others that will be of value throughout life. Health Education I will be required for eighth grade students.

Standard 1: Students will demonstrate the ability to use knowledge, skills, and strategies related to mental and emotional health to enhance self-concept and relationships with others.

Standard 2: Students will use nutrition and fitness information, skills, and strategies to enhance health.

Standard 3: Students will demonstrate health-promoting and risk-reducing behaviors to prevent substance abuse.

Standard 4: Students will demonstrate the ability to apply prevention and intervention knowledge, skills, and processes to promote safety in the home, school, and community.

Standard 5: Students will understand and summarize concepts related to health promotion and the prevention of communicable and non-communicable diseases.

Standard 6: Students will demonstrate knowledge of human development, social skills, and strategies to encourage healthy relationships and healthy growth and development throughout life.

Physical Education 9
Participation Skills & Techniques
 Required, 0.5 Credit
 Prerequisite: Physical Education 8

Participation Skills and Techniques is designed to develop competency in up to five different activities. Competency involves the ability to apply the basic skills, strategies, and rules using standardized guidelines or rubrics.

Measures are taken to ensure the physical and emotional safety of all students. Equipment is inspected regularly and maintained in proper working condition, and facilities are kept clean and free from hazards. Activities are offered that are safe and developmentally appropriate. Enrollment numbers meet NWAC's limiting standards so that students are safely supervised, and the curriculum is effectively delivered. Students feel free to participate and explore without the fear of failure, harm, or ridicule.

Intended Learning Outcomes:

1. Demonstrate competency in activity and physical fitness.
2. Derive satisfaction through fair play, skill development, and participation with people of diverse backgrounds.
3. Apply complex thinking through problem-solving skills in activity settings.
4. Develop strategies for a lifelong healthy lifestyle.
5. Apply attributes of responsible citizenship.

Standard 1: Students will demonstrate competency in motor skills and movement patterns needed to perform a variety of physical activities.

Standard 2: Students will demonstrate understanding of movement concepts, principles, strategies, and tactics as they apply to the learning and performance of physical activities.

Standard 3: Students will participate regularly in physical activity.

Standard 4: Students will achieve and maintain health-enhancing levels of physical fitness.

Standard 5: Students will exhibit responsible personal and social behaviors that show respect for themselves and others in activity settings.

Standard 6: Students will value physical activity for health, enjoyment, challenge, self-expression, and/or social interaction.

Health Education II
 Required, 0.5 Credit
 Prerequisite: Health Education 8

Health education provides opportunities for students to develop knowledge, skills, and attitudes necessary for practicing lifelong, health-enhancing behaviors. The Health II curriculum focuses on what students can do for themselves to meet the objectives of the six state core standards and illustrates the impact their attitudes and behaviors have on the world around them. The curriculum builds on the foundation established in Health I with an advanced, age-appropriate focus. Students will learn that they are responsible for their personal well-being and that building a solid

Standard 1: Students will demonstrate the ability to use knowledge, skills, and strategies related to mental and emotional health to enhance self-concept and relationships with others.

Standard 2: Students will use nutrition and fitness information, skills, and strategies to enhance health.

Standard 3: Students will demonstrate health-promoting and risk-reducing behaviors to prevent substance abuse.

foundation of health literacy and decision-making skills can contribute to positive health choices throughout life. In addition, they will explore the impact their personal health has on society as a whole. Health Education II will be a required course for ninth grade students.

Standard 4: Students will demonstrate the ability to apply prevention and intervention knowledge, skills, and processes to promote safety in the home, school, and community.

Standard 5: Students will understand and summarize concepts related to health promotion and the prevention of communicable and non-communicable diseases.

Standard 6: Students will demonstrate knowledge of human development, social skills, and strategies to encourage healthy relationships and healthy growth and development throughout life.

Career and Technical Education

Montessori students are encouraged to be curious about the world around them. The Montessori Philosophy provides for students in career and technical courses to gain knowledge about the world of work and career options based on student interest and personal skills. The classes will include exposure to various careers through a variety of activities, which may include guest speakers, field trips, and occupational visits.

Career & Technical Education 7 Required, 1.0 Credit

CTE allows students through activity-centered lessons to utilize technology, develop beginning skills, and explore careers. The course provides information regarding additional courses and training related to each student's career field of interest.

Intended Learning Outcomes:

1. Understand how self-knowledge (e.g., interests, abilities, and strengths) relate to career interests and selecting and achieving goals.
2. Understand education and occupation exploration and planning.
3. Understand career application of subject matter through participation in work-based learning experiences.
4. Identify career information and career options available in CTE areas (agriculture, business, family and consumer sciences, health science, information technology, marketing, skilled and technical science, and technology and engineering).
5. Participate in hands-on activities and create products consistent with the CTE Intro standards.
6. Identify career and post-secondary education options through investigation of High School to College and Career Pathways.
7. Demonstrate skills in processing self-knowledge in relation to CTE courses and programs, in relation to the world of work, and in relation to future planning.

Goal 1: Self-Knowledge

1. Assessing individual interest and abilities by helping each student understand his or her future role as a worker and a family member and become aware of those life skills necessary to be a contributing member of society.

Goal 2: Education and Occupation Exploration

1. Exploring the nature of work and the changing world of work.
2. Exploring nontraditional as well as traditional roles.
3. Experiencing broad exposure to technologies and processes found in the workplace.

Goal 3: Career Planning

1. Understanding the importance of education and occupational decision-making.
2. Examining education and training that are necessary and available for various careers.
3. Planning the future for each student through the Student Education occupation Plan (SEOP) process, which is developed in cooperation with parents, counselors, and educators.

Keyboarding 7 or Proficiency
Required, 0.5 Credit

In this beginning semester keyboarding course, the student will master touch operation on a computer keyboard. Correct fingering by touch operation and good techniques will receive primary emphasis; speed and accuracy will be given secondary emphasis. The student will learn to format simple reports, personal and business letters, and tables.

Standard 1: The student will demonstrate correct touch keyboarding techniques at the keyboard and use appropriate terminology to identify computer components.

Standard 2: Students will develop touch keystroking speed and accuracy.

Standard 3: Students will demonstrate a working knowledge of basic word processing functions and proofreading.

Standard 4: Students will develop skill composing at the keyboard.

Electives

Mountain West Montessori Academy (MWMA) students will have the opportunity to elect courses, based on individual interest level and natural curiosity, to enrich the classroom experience through individual expression. The goal of student participation in electives is to encourage creativity, independence, and personal growth. The Montessori philosophy promotes an interconnected view of all subjects, and this concept will be reflected in elective course offerings.

Junior High students will be offered electives according to teacher talents and funding availability for specialists. MWMA's guidelines for providing secondary elective courses will follow the Montessori tenets of student choice, attention to the whole person, and development of independence.

Below are examples of elective courses from which Mountain West Montessori Academy secondary students may choose.

Art Foundations I [Fine Arts] Grade(s) Offered: 7, 8 Elective, 0.5 Credit	
This course is designed to provide an overview of Visual Arts while studying a broad variety of art tools and materials. With an emphasis on studio production, this course is designed to develop higher-level thinking, art-related technology skills, art criticism, art history, and aesthetics.	Standard 1: Students will assemble and create works of art by experiencing a variety of art media and by learning the art elements and principles. Standard 2: Students will find meaning by analyzing, criticizing, and evaluating works of art. Standard 3: Students will create meaning in art. Standard 4: Students will find meaning in works of art through settings and other modes of learning.
Art Foundations II [Fine Arts] Grade(s) Offered: 7, 8 Elective, 0.5 Credit	
Art Foundations 8 provides an overview and introduction to visual arts through studying a variety of art tools and materials. This course builds on Foundations 7 with a more in-depth experience with fewer art forms. This course is designed to develop higher-level thinking, art-related technology skills, art criticism, art history,	Standard 1: Students will assemble and create works of art, manipulate art media, and organize images with the elements and principles of art. Standard 2: Students will find meaning by analyzing, criticizing, and evaluating works of

and aesthetics, with an emphasis on studio production. With an emphasis on studio production, this course is designed to develop higher-level thinking, art-related technology skill, art criticism, art history, and aesthetics.

art.

Standard 3: Students will create meaning in art.

Standard 4: Students will find meaning in works of art through settings and other modes of learning.

FACS Exploration
[Career & Technical Education]
Grade(s) Offered: 7, 8
Elective, 0.5 Credit

This course provides students the opportunity to learn essential life skills. It allows them to develop skills in food and nutrition, childcare, interior design, clothing construction and style, consumerism, family relationships, personal responsibility, and job-related tasks.

Creative Writing I
[Language Arts]
Grade(s) Offered: 7, 8, 9
Elective, 0.5 Credit

Through this course, students will explore the art and craft of creative writing including poetry, short story, essay, memoir, and drama. Students will be encouraged to develop their own personal voice. Literary works will serve as models through analysis, application, and imitation. Composition exercises will reflect an understanding of studied forms and an application of creative techniques.

Standard 1 (Reading Comprehension): Students will use vocabulary development and an understanding of text elements and structures to comprehend literary and informational grade level text.

Standard 2 (Writing): Students will write informational and literary text to reflect on and recreate experiences, report observations, and persuade others.

Standard 3 (Inquiry): Students will understand the process of seeking and giving information in conversations, group discussions, written reports, and oral presentations.

Foreign Language
[World Languages]
Grade(s) Offered: 7, 8, 9
Elective, 1.0 Credit

Students will examine the topic of language awareness. Through this multi-lingual experience, students will recognize similarities and differences in spoken language, learn basic expressions, vocabulary, and become more aware of contemporary issues related to each language. This course helps students to discover the rich diversity of world languages and cultures, introduces them to languages taught in the secondary schools, and provides a foundation on which to select a more intensive study in a specific language of their choice.

Specific language course offerings will depend on student interest and teacher certification.

Band I, II, & III
[Fine Arts]
Grade(s) Offered: 7, 8, 9
Elective, 1.0 Credit

Band I provides opportunities for students to develop their musical potential and aesthetic understanding through learning to play a woodwind, brass, or percussion. Study includes the care and cultivation of a beautiful tone, the ability to read music, the building of technical skills, team spirit, and responsible rehearsal habits. Students will have opportunities to experience the spontaneity of improvisation and the creative process of composing. Students will strengthen listening skills and their ability to analyze and evaluate music and music performances. Attention will also be given to relating their music experiences to the time and culture of the pieces they study, as well as to contemporary society.

Band II further develops and refines core concepts and fundamentals introduced in Beginning Band. Study includes the care and cultivation of a beautiful tone, the ability to read music with increasing fluency, the building of technical skills, team spirit, and responsible rehearsal habits. Students will have opportunities to experience the spontaneity of improvisation and the creative process of composition. Students will heighten listening skills and increase their ability to analyze and evaluate music and music performances.

Band III provides opportunities to foster and refine musical expression through instrumental performance, analytical/evaluative skills, and aesthetic judgment. Study includes the care and cultivation of a beautiful tone, the ability to read music with fluency, the polishing of performance skills, team spirit, and responsible rehearsal habits.

Choir I, II, & III
[Fine Arts]
Grade(s) Offered: 7, 8, 9
Elective, 1.0 Credit

Choir I provides opportunities for students to develop their musical potential and aesthetic understanding through singing in a choral mixed ensemble. This class is open to all students. Emphasis will be placed on quality vocal production, individual singing, and music reading skills. Rehearsals and performances outside of class time are part of the course requirement and will constitute a portion of the grade.

Choir II provides opportunities for students to develop their musical potential and aesthetic understanding through singing in a choral ensemble. Study includes the care and cultivation of a beautiful tone, aesthetic sensitivity, the ability to read music with increasing fluency, the building of technical skills, team spirit, and responsible rehearsal habits. Students will have opportunities to experience the spontaneity of improvisation and the creative process of composition. Students will heighten listening skills and increase their ability to analyze and evaluate music and music performances.

Choir III provides opportunities for students to develop their musical potential and aesthetic understanding through singing in a choral ensemble. Study includes the care and cultivation of a beautiful tone, aesthetic understanding, the ability to read music with fluency, the polishing of performance skills, team spirit, and responsible rehearsal habits. Students will have opportunities to experience the spontaneity of improvisation and the creative process of composition. Students will hone listening skills and their ability to analyze and critique music and music performances. Attention will also be given to relating their music experiences to the time and culture of the pieces they study, as well as to contemporary society.

Theatre Foundations I, II, & III

[Fine Arts]

Grade(s) Offered: 7, 8, 9

Elective, 0.5 Credit

There are two basic goals in Theatre Foundations I: finding meaning in works of theatre art through the study and appreciation of theatre as an art form, and constructing meaning in works of theatre art through the study and skill development of theatre techniques in the creation of that theatre art. This is the entry-level course that introduces these two concepts.

To the two basic goals, Theatre Foundations II adds depth as well as breadth through the study of dramatic unity, comparison and integration of art forms, analysis and critique of performance, and understanding of context and the effect of history and culture on character action. *The prerequisite for this course is Foundations I.*

Theatre Foundations III adds depth as well as breadth through the study of production unity, character conflict, character motivation through movement and voice, projecting mood and feelings, trust, the design concepts of visualization and technology, researching a script, variety in art forms, assessing performance effectiveness, and famous theatre professionals. *The prerequisite for this course is Foundations II.*

Journalism I

[Language Arts]

Grade(s) Offered: 7, 8, 9

Elective, 0.5 Credit

This course is designed to introduce students to newspaper writing and reading. Interviewing, writing, and editing are emphasized. Students produce a class newspaper.

Computer Technology

[Career & Technical Education]

Grade(s) Offered: 9

Elective, 0.5 Credit

This course provides an introduction to computer application software that encompasses document processing, spreadsheets, and presentations. An understanding of ethics and use of operating systems, information resources, and electronic mail is included. Skills will be demonstrated by creating a project for a different content area.

Photography I & II

[Fine Arts]

Grade(s) Offered: 9

Elective, 0.5 Credit

Photography I focuses on basic procedures for operating a digital and/or analog camera and understanding light. It may include making prints and enlargements and/or digital software editing and production techniques.

Photography II is an intermediate course emphasizing photography as an art form.

Food and Nutrition I & II
[Family & Consumer Science]
Grade(s) Offered: 9
Elective, 0.5 Credit

Food and Nutrition I is designed for students who are interested in understanding the principles of nutrition and in maintaining a healthy life style. Attention will be given to the selection and preparation of food and personal health and well-being.

Food and Nutrition II prepares students to understand the principles of food preparation, safety, sanitation, management and consumerism used in the home and food industry. Nutrition principles and applications will be emphasized.

Support for Standards and Use of Data

Mountain West Montessori Academy (MWMA) understands the importance of aligning Montessori Curriculum with Utah State Core Curriculum in order for state assessments to have fidelity. MWMA intends to directly and thoroughly correlate the Montessori curriculum with Utah state academic content standards. This will be accomplished by contracting a consulting company that specializes in aligning Montessori materials and lessons with current state standards at a cost of approximately \$8,000. This is budgeted as part of the planning year purchased professional and technical services in MWMA's budget. This correlation will enable a progression of content knowledge that aligns with state standards while maintaining use of Montessori materials and methods of instruction. Any curricular gaps will be addressed by selection and implementation of additional research-based curriculum. Our desire for educational innovation aims to alter not essential content, but the method in which it is taught. The Utah Core Curriculum represents worthy goals in teaching students higher order thinking skills, application of knowledge, and deeper understanding of concepts; success in this endeavor will come with excellent teachers and instructional methodologies in well-supported classrooms. MWMA's Board recognizes the importance of making sure the Montessori curriculum is aligned with the Utah State Standards in both content and sequence in order for Montessori students to be prepared for state assessments.

MWMA will use a computer-based Montessori record keeping system (\$10,000), the USOE data display (no cost), and USOE Gateway (no cost) to maintain achievement data. A computer based Montessori record-keeping program, such as Montessori Records Xpress (MRX) allows for teachers to record specific student skill proficiency and has been included in the supply budget. The state supported SIS (student information system) will be used by MWMA. This system allows for pre-print ordering and coordination with USOE on computer based state testing. Training on SIS will be given to all staff, inclusive of teachers, paraprofessional, and secretarial staff. It is important for multiple record keeping functions at the school and needs to be accurate in order for the data display at USOE to be accurate. SIS may also be used for discipline tracking at MWMA. The MWMA Director will designate a lead teacher in assessment to work with the Director in making sure that teachers have access and training in how to use data from the USOE data display. Annually one day of in-service before school starts will be dedicated to data analysis and its use for appropriate instructional adjustments for both whole class and individual students. Faculty meetings and grade level meetings will regularly look at assessment data gathered from the Montessori record keeping system in order to identify specific skills that might need remediation and/or enhancement. The Director will be responsible for assuring that assessment data is understood by all faculty members and will arrange for needed trainings.

Student Achievement will be regularly reported to the MWMA Governing Board by the Director.

<i>Indicator - Student achievement level</i>		
Measure	Metric	Board Goal
Progress score on Utah adopted assessments.	Attainment of minimum status composite score (school wide) on Utah adopted assessments.	MWMA will rank in the top 1/3 of the state.
Proficiency levels on Reading	Proficiency score on DIEBELS Next (3 rd grade)	86%
Proficiency levels on Language Arts	Percentage of students scoring proficient on Language Arts CRT's	88%
Proficiency levels on Mathematics	Percentage of students scoring proficient on Mathematics CRT's	80%
Proficiency levels on Science	Percentage of students scoring proficient on Science CRT's	80%
Proficiency levels on state assessments by subject for disaggregated groups	Year one will be a baseline for disaggregated groups in subject areas of Language Arts, Mathematics, and Science. For example, within each subject area Ethnicity, Special Education, and Economically Disadvantaged.	Each disaggregated group will increase proficiency minimally by 2% annually up to 92%, thereafter 1% annually.

The above percentages for Language Arts, Mathematics, and Science are above the surrounding schools, including the highest performing charter school in South Jordan.

References

- Hunsaker, S. L., Erwin, K., Pack, V., & Odoardi, R. (2008). Utah gifted and talented handbook: Grades K-12. Salt Lake City, UT: Utah State Office of Education.
- Lillard, A. & Else-Quest, N. (2006, September 29). Evaluating Montessori education. *Science Magazine*, 313(5795), 1893-1894.
- McClellan, D. E. & Kinsey, S. J. (1999, Spring). Children's social behavior in relation to participation in mixed-age or same-age classrooms. *Early Childhood Research and Practice*, 1(1).
- Rathunde, K. & Csikszentmihalyi, M. (2005, May). Middle school students' motivation and quality of experience: A comparison of Montessori and traditional school environments. *American Journal of Education*, 111(3), 341-348.
- Reeve, J. & Tseng, C. M. (2011, October). Agency as a fourth aspect of students' engagement during learning activities. *Contemporary Educational Psychology*, 36(4), 247-267.
- Sims, P. (2011, April 5). The Montessori mafia. *The Wall Street Journal*.
- Terenzini, P. T., Springer, L., Pascarella, E. T. & Nora, A. (1995, January). Influences affecting the development of students' critical thinking skills. *Research in Higher Education*, 6(1), 23-29.
- Tomlinson, C. A. (2000, August). Differentiation of instruction in the elementary grades. *ERIC Digest*, EDO-PS-00-7.

Section 10
School Closure Plan

Closing a public charter school would present significant challenges to any governing board. As the Governing Board of Directors at Mountain West Montessori Academy (MWMA), we believe any responsible approach must reflect careful consideration of the amount of data that would be compiled and analyzed, public meetings that would be held, business that would be conducted, and political considerations that would be addressed upon making the decision to close a school, and the impact of those decisions throughout the school closure process. In the unforeseeable event MWMA closes, the Governing Board of Directors asserts its commitment to establish and adhere to an orderly school closure plan consistent with Utah Code Annotated § 53A-1a-510.5 and other applicable law; a school closure plan that provides for continuity of instruction until the closure date, student support in identifying new school options, and addresses the school’s financial, legal, and reporting obligations.

Identification of Missed Targets

We understand that charter schools in Utah are generally successful, but they can struggle with deficiencies in finance, governance, academics, and other operational aspects. As part of this charter, the Governing Board of Directors has set goals that specify key indicators, measures, metrics, and targets in the areas of achievement, attendance and performance. While the Governing Board of Directors will review and reassess its goals annually, the following individuals will be responsible for monitoring/reporting throughout the year in each of the areas listed in the chart below:

Annual Goal:	Responsible Individual	Frequency of Review	Reports findings to:
Student Achievement	Administrator	Quarterly	Board of Directors
Board Performance & Stewardship	Board Chair	Semi-Annually	Board of Directors
Financial Performance & Sustainability	Treasurer	Quarterly	Board of Directors
Student Attendance & Re-enrollment	Administrator	Quarterly	Board of Directors

These responsible individuals will review progress towards the school’s goals and report their findings to the Governing Board of Directors. In turn, the Governing Board of Directors will use these regular reports and its comprehensive annual review of these goals in an effort to, among other things, identify and remedy potential problems in their early stages of development. Further, the Governing Board of Directors acknowledges its responsibility to notify the State Charter School Board of any potential missed targets in advance of state reviews. In addition, MWMA will do an annual report card to stakeholders.

Notice

If early identification and remedial action do not resolve a major operational deficiency, and the Board decides to close the school, the school will provide written notice of the decision to the State Charter School Board, the State Board of Education, parents of students, the school's creditors, and the school district (Utah Code Ann. Section 53A-1a-510.5(2)(a)). Written notice will be given as soon as possible following the decision and contain, at minimum, the required elements found in Utah Code Ann § 53A-1a-510.5(2)(b) (the proposed date of the school closure, the school's plan to help students identify and transition to a new school, and contact information for the school during the transition).

Develop/Monitor Implementation of Closure Plan

To ensure efficient winding up of the governance, operations, finance and reporting, the Governing Board of Directors will convene as many times as necessary to establish a timeline and closing plan for the school. These meetings will be held as soon as possible following the decision to close the school. The purpose of these meetings, in order of *general* prioritization, will be to address the following:

1. Ensure Compliance with “Notice” Requirements. The Governing Board of Directors will review notifications that have been sent and ensure all requirements have been met as it relates to notice of the school's closure.
2. Financial Review. The Governing Board of Directors will conduct an initial review of the school's budget to determine the school's current financial position, consider necessary budget amendments and ensure adequate funding for ongoing operational costs and expenses related to the winding up of the school.
3. Establish Transition Team. As soon as possible, the Governing Board of Directors will establish a transition team, assign roles to team members, and work with the team to develop a formal “Closure Plan,” which will include identification of the specific individuals charged with varying aspects of the school closure. *This Closure Plan will be submitted to the Utah Charter School Board as soon as possible following the decision to close pursuant to Utah Code Annotated § 53A-1a-510.5(3)(a).*
4. Meet with School Staff and Faculty. As soon as the necessary information is available, the Governing Board of Directors will meet with faculty and staff to discuss the reasons for closure, applicable timelines, emphasize the importance of maintaining continuity of instruction (if applicable), and describe the plan for students and student records. Given the amount of data the Governing Board of Directors would review upon a decision to close, the Governing Board of Directors or its authorized representative would likely meet with staff

and faculty on multiple occasions to discuss progress on the closure plan, new information, and available support for employees.

School Closure Transition Team, Responsibilities, and Areas of Experience

The school closure transition team would consist of individuals with backgrounds in law, school administration, accounting/finance, and general secretarial duties. The Governing Board of Directors will appoint one or more of these individuals to serve as custodian(s) over student files and/or financial records as required by Utah Code Ann. § 53A-1a-510.5(b). For example, the Governing Board of Directors may appoint its Director to oversee student and employee transition efforts, and appoint this individual as custodian over student files; at the same time, the Governing Board of Directors could appoint a CPA to oversee corporate dissolution, inventory and distribution of assets, the closure plan's budget, and appoint this individual to serve as custodian over all school business records.

The Governing Board of Directors has organized the dissolution process into four general categories: (1) Development/Monitoring of formal closure plan; (2) Finalization of governance and school operations; (3) Finalization of school finances; and (4) Finalization of school reporting. After finalization of these categories has occurred, the formal corporate dissolution may take place. The Governing Board of Directors has several options regarding its approach to addressing the professional needs of the school during the dissolution process. For example, the school could hire a trustee to address the financial and corporate aspects of dissolution and hire the school's Director or a retired administrator or other individual with education experience to finalize school-related issues. Another approach would be to engage an attorney (for corporate, governance, and human resources finalization), a part-time secretary to staff the office, and a part-time administrator to oversee student/family transition needs, staff/faculty needs, and ongoing school reporting needs.

After consideration of the areas of expertise possessed by each individual appointed to the transition team, the Governing Board of Directors will select one individual to serve as director of the team. The team director will have appropriate expertise in educational support, finances, and law or recruit team members with those areas of expertise.

The team's primary responsibilities will include, but not be limited to, the following:

- Prepare a formal school closure plan for submission to the Utah Charter School Board as required by Utah Code Ann § 53A-1a-510.5(3)(a);
- Oversee and/or assist with the completion of the initial financial audit and the closing audit outlined in Utah Code Ann. § 53A-1a-510.5(3)(e) and (7) respectively;

- Provide a comprehensive fixed asset schedule and identify/inventory all assets as described below;
- Provide for the protection of student files and school business records;
- Staff and maintain a base of operation throughout the school closing period that will include an office, hours of operation, and phone/messaging service as required by Utah Code Ann. § 53A-1a-510.5(3)(c);
- Maintain insurance coverage and risk management coverage throughout the transition to closure or as directed by the State Charter School Board as required by Utah Code Ann. § 53A-1a-510.5(3)(d); and

Take reasonable precautions to protect school property/assets from theft, misappropriation, and deterioration as required by § 53A-1a-510.5(3)(h) and 34 CFR 80.32.

Student Transition Assistance

The Governing Board of Directors will select a member (or members) of the transition team to be responsible for providing support for students and transitioning student records. Student transition assistance will include notification to all parents of key transitional information (in addition to the information required in Utah Code Annotated § 53A-1a-510.5(2)(b)). Such notices will provide specific contact information for team members who can answer questions about the closing/transition, assist students as they choose a new school and select classes, explain the process surrounding access and transferability of student records, and respond to other general questions. Information and guidance for students and their families will be placed on the school's website and updated regularly. The MWMA transition team will work with schools accepting students transitioning from MWMA to make the transition as seamless as possible for students and families.

As part of the school's registration procedure, the school will determine which families lack Internet accessibility. These families will receive closure updates/newsletters via mail as new information becomes available. The responsible individual(s) will be tasked with maintaining an updated mailing list of families who lack Internet access, maintaining and updating parent/student information on the school's website and will be trained or have experience in effectively communicating with parents regarding the issues facing students and their families.

In addition, the individual(s) will be charged with sending all student records to the receiving school upon request and maintaining a list for the Governing Board of Directors of all students whose records have not been transferred. The Governing Board of Directors may assign this individual(s) to establish a follow up procedure to determine where each student enrolled at the time of closing and where they will continue their education.

Employee Transition

The Governing Board of Directors will select a member of the transition team to be responsible for handling issues related to staff and faculty transition. In addition to being notified of the closure plan by the Governing Board of Directors, the appointed individual will be responsible for providing formal written notice to all employees of their last day of employment, the date of termination of benefits and their associated rights (i.e. COBRA), and eligibility for additional benefits or support. The Governing Board of Directors will make every effort to minimize the negative impact associated with losing employment.

Maintenance of Records and Identification, Distribution, and/or Disposal of Assets

The school's business manager or Education Service Provider (ESP) will be directed to prepare and present a comprehensive fixed asset schedule within fourteen (14) days of the decision to close the school. In accordance with Utah Code Ann. 53A-1a-517, assets will be inventoried and identified as being loaned, encumbered by terms of contingent gift, grant, donation, or security interest, or purchased with federal funds. The fixed asset schedule will be updated quarterly until dissolution is complete. For assets covered under the provisions of 34 CFR 80.32, the ESP will ensure the *management* (34 CFR 80.32(d)) and *disposition* (34 CFR 80.32(e)) of such assets is in accordance with federal rule or other applicable restrictions. In addition, all the school's business records and records relating to federal grants will be kept in accordance with 34 CFR 80.42 as applicable.

Assets held subject to written conditions or limitations, will be disposed of in accordance with applicable codes, rules, conditions or limitations. Throughout the dissolution process, the Governing Board of Directors will ensure that the school's assets are protected against theft, misappropriation, and deterioration.

Assets not held subject to rules, conditions, or limitations will be liquidated in a manner to ensure the highest possible price; this could be accomplished by retaining an auctioneer. Transactions will be documented as required. In accordance with Utah Code Ann. § 53A-1a-510.5(4), proceeds will be used to satisfy or discharge the school's liabilities and obligations to the extent of the school's assets. Remaining assets will be distributed for an exempt purpose to

the Utah Charter School Board in accordance with the restrictions contained Section 501(c)(3) of the Internal Revenue Code.

The Governing Board of Directors will also direct its ESP to prepare and present a list of business entities that have a contractual relationship with the school (Utah Code Ann. § 53A-1a-510.5(5)). After review of each contractual relationship, the Governing Board of Directors will establish the method by which these relationships will be terminated to whatever extent it is possible *unless* such relationships are necessary for the school's closure plan.

Reports

The Governing Board of Directors will appoint one or more members of the transition team to be responsible for the continued submission of required reports. Reports will likely require expertise in both school administration and finance; therefore, the Governing Board of Directors anticipates it would assign the team member finalizing school operations and the team member finalizing financial matters to work together, as dictated by the subject matter of the report, to ensure timely and accurate submissions.

In the event of a decision to close, the Governing Board of Directors acknowledges and agrees to submit all documentation required by the Utah Charter School Board, including documentation that verifies its compliance with procedural requirements as well as satisfaction of financial issues related to the school closure. Additionally, the Governing Board of Directors agrees to conduct a final audit of the school subsequent to the formal and final corporate dissolution.

Financial Reserves/School Closure Budget

The Mountain West Montessori Academy Governing Board of Directors has budgeted \$92,396 the first operational year and \$113,835 the second operational year for expenses associated with implementing the school's closure plan. Additional information is included in the **Detailed Business Plan – Section 6**.

Dismissal Procedures and Suspension/Expulsion

Dismissal Procedures

The school's philosophy with discipline is to take a proactive approach by presenting clear classroom policies and expectations regarding student behavior on the first day of school and reinforce these expectations consistently throughout the school year. Because of the hands-on role that teachers play with the students on a daily basis, teachers are typically the first school official involved in most behavior issues. Teachers are expected to provide an environment that promotes learning for all students.

In order to create this environment, teachers may include both positive and negative reinforcements that are consistent with recognized best practices. These reinforcements will not violate the policy of Mountain West Montessori Academy (MWMA) or any applicable state and federal law.

Most problems can and should be handled in the classroom. When teachers are unable to remedy behavior problems in the classroom, teachers will work closely with the student, parents/guardians, and or other school staff to coordinate their efforts in the resolution of discipline matters. In the event that suspension/dismissal is required, MWMA staff will act pursuant to the applicable student discipline policy and in accordance with IDEA and all other applicable state and federal laws.

A proposed Suspension and Expulsion Policy is included as **Attachment D**. The policy includes thorough due process procedures for both general education students as well as students with disabilities. The discipline provisions for students with disabilities comply with IDEA 2004 and Utah special education rules. Section 4 of the policy establishes the grounds for suspension and expulsion in accordance with Utah law. Section 5 of the policy sets forth the authority to suspend or expel. Sections 9 and 10 contain the due process procedures applicable to suspensions and expulsions.

Suspension and Expulsion Procedures

A *suspension* is the temporary removal of a student from class(es) or school. Suspension procedures specific to students with disabilities follows is outlined later in this section (see Discipline Procedures for Students with Disabilities). A suspension can be determined by the Director (or designee). The administration will typically contact the parent/guardian in connection with the suspension and provide other minimal due process procedures, prior to

suspension. Such procedures in a suspension situation include the right to know what the alleged offense is and the right to provide an explanation. This conversation with the parent/guardian should be documented by the school official in writing or on a permanent computer file. There may be instances, however, when a student is subject to an immediate suspension without due process if his/her behavior is illegal or presents an immediate danger to persons (himself/herself included) or property. In such cases, the due process procedures will be held as soon as practicable. Students younger than fourteen (14) should never be released until and unless a parent or emergency contact is notified. The student should be supervised until a responsible person is made aware of the suspension and MWMA is given permission to release the student to the custody of an adult or to leave the premises.

An *expulsion* is the formal process of dismissing a student from school for an extended period of time, up to one year. Expulsion also transfers the primary responsibility of providing educational services for the student during the expulsion period from MWMA to the parent/guardian, and makes the parent/guardian responsible for compliance with the state's compulsory law for the duration of the expulsion. An expelled student will be entitled to due process, which may include the following procedures:

- i. Prior notice of the charges and the proposed sanctions so as to afford a reasonable opportunity for preparation. The notice shall be in writing, and the student shall be notified of the hearing date.
- ii. Right to a hearing.
- iii. Right to a fair hearing officer (credible and objective person or panel – not necessarily uninformed).
- iv. Right to an adult representative and/or legal counsel at the hearing.
- v. Opportunity to testify and to present evidence and witnesses in his/her defense.
- vi. Opportunity for the hearing officer or panel to examine the evidence presented by the school administration and to question witnesses. (However, the hearing officer or panel may, upon a finding that good cause exists, determine that the disclosure of the identity of a witness and the testimony of that witness at the hearing would subject the witness to an unreasonable risk of harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations which shall be examined only by the hearing officer or panel. Copies of these sworn declarations which are edited in such a manner as to delete the name and identity of the witness shall be made available to the student.)
- vii. A summary written record shall be maintained by any means. An electronic recording may be made; however, the electronic recording is not the official record of the hearing.
- viii. All witnesses appearing at the hearing shall be placed under oath.
- ix. If the hearing officer or panel conducting the hearing upholds the expulsion decision, findings of fact in support of the decision shall be prepared.
- x. The decision must be made by a preponderance of the evidence. The decision will be based exclusively on the evidence presented at the hearing. The final decision shall be communicated to the student and parent/guardian within ten (10) working days. MWMA officials and the student have the right to legal counsel at any step in the process.

- xii. If a student is suspended or expelled for more than ten (10) school days, the parent or guardian is responsible for undertaking an alternative education plan, which will ensure that the student's education continues during the period of suspension/expulsion.

Mountain West Montessori Academy shall maintain a record of all suspended or expelled students and a notation of the recorded suspension or expulsion shall be attached to the student's transcript.

Right to Appeal

If required to satisfy due process, the expelled student/guardian may have the right to appeal the expulsion decision by requesting a review hearing before Mountain West Montessori Academy's Governing Board of Directors, a committee of the Governing Board of Directors, or a neutral panel designated by the Governing Board of Directors. Such an appeal must be in writing and must be received in the School's office within thirty (30) calendar days following receipt of the decision. (Pending a final decision on the appeal, the original decision shall remain in force.)

This review hearing will not be a hearing de novo and will be held within thirty (30) calendar days following receipt of the request for the hearing.

All necessary copies of the record of the expulsion hearing will be provided to the interested parties within fifteen (15) working days of the student's request.

No evidence other than that contained in the record of the original hearing may be heard.

The review of the decision on appeal shall be limited to the following issues:

- i. Did school officials satisfy the procedural requirements of the policy?
- ii. Was the decision to expel the student supported by the findings of fact?
- iii. Were the findings of fact supported by the evidence?

Following the review hearing, the person or panel hearing the appeal shall decide in public and shall enter an order either affirming or reversing the original decision.

The decision on appeal shall be binding upon the student and shall be served upon the student in writing by personal service or by certified mail.

Discipline Procedures for Students with Disabilities

The Director has the authority to suspend a student with disabilities (504 or IDEA) for not more than ten (10) consecutive school days, and additional removals of not more than ten (10) total school days in that same school year for separate incidents of misconduct so that those removals do not constitute a pattern resulting in a change of placement. The School need not provide

services during periods of removal of ten (10) days cumulative or less if services are not provided to a student without disabilities who has been similarly suspended.

Where the student is receiving special education services or accommodations on the basis of disability under IDEA, 504 or ADA, procedures outlined in the Utah State Board of Education Special Education Rules shall be followed, including prior written notice to parents or guardians regarding their procedural due process rights, before any long-term disciplinary action or change of placement takes place.

For purpose of the removal of a student with a disability from the student's current educational placement, a "change of placement" occurs if (a) the removal is for more than ten (10) consecutive school days or (b) the student is subjected to a series of removals that constitute a pattern because they total more than ten (10) school days in a school year or because of factors such as the length of each removal, the total amount of time the student is removed, and the proximity of the removals to one another. Any "change of placement" requires compliance with the change of placement procedures outlined in this section.

Change of Placement Procedures

When a determination is made that the conduct of a student on a 504/ADA student (but not a student who is disabled under IDEA) is not a manifestation of the student's disability pursuant to Section 10.5, the student shall be subject to the same disciplinary consequences as general education students, up to and including expulsion from the School without educational services (*See OSEP memorandum of April 26, 1995*).

The School need not provide services during periods of removal to a student with a disability under IDEA who has been removed from his or her current placement for ten (10) school days or less in that school year if services are not provided to a student without disabilities who has been similarly removed.

If a student with a disability under IDEA has been removed from his or her current placement for more than ten (10) school days in the same school year, for the remainder of the removals, the School shall provide services to the extent necessary to enable the student to progress in the general curriculum and appropriately advance toward achieving the goals set out in the student's IEP. School personnel, in consultation with the student's special education teacher, determine the extent to which services are necessary to enable the student to appropriately progress in the general curriculum and advance toward achieving the goals set out in the student's IEP.

Special Circumstances

A student's IEP team may order a change in placement of a student with a disability to an appropriate interim alternative educational setting for the same amount of time that a student without a disability would be subject to discipline, but for not more than forty-five (45) days, if:

- a) The student carries a weapon to School or to a School-sponsored activity;
- b) The student knowingly possesses or uses illegal drugs or sells or solicits the sale of a controlled substance while at School or a School-sponsored activity; or
- c) Has inflicted serious bodily injury upon another person while at School, on School premises, or at a School-sponsored activity.

Change of Placement Due to Student's Serious Misconduct

Parents/guardians may request due process hearings in order to change the student's placement recommended by the IEP team. A hearing officer may order such a change, if he/she:

- (1) Determines that School officials have demonstrated by substantial evidence that maintaining the current placement of a student is substantially likely to result in injury to the student or others;
- (2) Considers the appropriateness of the student's current placement;
- (3) Considers whether School officials have made reasonable efforts to minimize the risk of harm in the student's current placement, including the use of supplementary aids and services; and
- (4) Determines that the interim alternative educational setting being recommended by the IEP team (a) has been selected so as to enable the student to continue to progress in the general curriculum, although in another setting, and to continue to receive those services and modifications, including those described in the student's current IEP, that will enable the student to meet the goals set out in that IEP: and (b) includes services and modifications designed to address the behavior at issue so that it does not recur.

Parental Notice

As soon as a decision is made by School officials to remove a student with a disability from his/her current placement for more than ten (10) school days, the student's parents must be notified of that decision and of all procedural safeguards outlined by law and School policy.

IEP Meetings for Manifestation Determination

Immediately, if possible, but in no case later than ten (10) school days after the date on which the decision is made to remove the student from the current placement, a review must be conducted of the relationship between the student's disability and the behavior subject to the disciplinary action.

The manifestation review must be conducted by the student's IEP team and other qualified School personnel.

In conducting the manifestation review, the IEP team may determine that the behavior of the student was not a manifestation of student's disability only if the IEP team:

- [a] First considers, in terms of behavior subject to disciplinary action, all relevant information, including:
 - i. Evaluation and diagnostic results, including the results or other relevant information supplied by the parents of the student;
 - ii. Observations of the student; and
 - iii. The student's IEP and placement; and
- [b] Then determines whether:
 - i. The conduct in question was caused by or had a direct and substantial relationship to the child's disability; or
 - ii. The conduct in question was the direct result of the School's failure to implement the student's IEP.

If the IEP team determines that either of the standards above was met, the behavior must be considered a manifestation of the student's disability.

Determination that Behavior was Manifestation of Disability

If the result of the manifestation review is a determination that the behavior of a student with a disability was a manifestation of the student's disability, the student must remain in or be returned to the prior placement.

Determination that Behavior was not Manifestation of Disability

If the result of the manifestation review is a determination that the behavior of a student with a disability was not a manifestation of the student's disability, the relevant disciplinary procedures applicable to students without disabilities may be applied to the student in the same manner in which they would be applied to students without disabilities, except that a free appropriate public education must still be made available to the student if the student is suspended or expelled from School.

IEP Meetings for Functional Behavioral Assessments

If School officials have not conducted a Functional Behavioral Assessment (FuBA) and implemented a Behavioral Intervention Plan (BIP) for the student before the behavior that results in a removal from the School for longer than ten (10) school days or a change of placement to an

interim alternative educational setting, School officials shall convene an IEP meeting to complete a manifestation determination as well as develop a FuBA and implement a BIP.

If the student already has a BIP, the IEP team shall complete a manifestation determination and review the existing BIP and modify as necessary to address the behavior.

Placement During Appeals and Stay Put

If a parent requests a due process hearing to challenge the interim alternative educational setting or the manifestation determination, the student must remain subject to the disciplinary action pending the decision of the hearing officer or until the expiration of the forty-five (45) day period, whichever occurs first, unless the parent and School officials agree otherwise.

If a student is placed in an interim alternative educational setting and School personnel propose to change the student's placement after expiration of the interim alternative placement, during the pendency of any proceeding to challenge the proposed change in placement the student must remain in the current placement (the student's placement prior to the interim alternative education setting), unless School officials succeed in getting an order through an expedited hearing.

Section 12

Complaints

Mountain West Montessori Academy (MWMA) appreciates the particular importance of effective communication between all stakeholders – students, parents, school staff, administration, and the Governing Board of Directors – in the school environment. Montessorians place a high value on grace, courtesy, respect and responsibility. MWMA believes that the mutual respect that allows effective communication is an indispensable ingredient for the positive learning environment that the school seeks to create. The school has therefore established a procedure to review complaints and grievances in a productive, timely and fair manner. The purpose of these procedures is to secure, at the lowest possible administrative level, equitable resolution to complaints that arise at the school.

The school's proposed complaint policies for parents, staff, and for parents of students under IDEA are contained in **Attachment E**.

Parental Involvement

Opportunities for Parental Involvement & Volunteering

Parental involvement in a student's education is an important element of the Montessori philosophy as well as an important purpose of charter schools. Parents and guardians of Mountain West Montessori Academy (MWMA) students will be encouraged to participate in the school, and the school will strive to provide a wide variety of participation opportunities.

Parents will have opportunities for meaningful involvement in the decision making at the School through membership on MWMA's Governing Board of Directors. Nominations for open seats on the Governing Board of Directors will be solicited from the parent community. Parents will also be able to serve on MWMA's School LAND Trust Committee, which makes important decisions about the allocation of certain school funds to support the school's educational programs.

The Director will be encouraged to create an inclusive, collaborative environment at the school by soliciting feedback and information from parents regarding managerial decisions through surveys and focus groups. We believe that soliciting such input helps to create an inclusive environment where parents are more likely to buy into and support the Director's managerial decisions.

Parents will be encouraged to actively participate in their student's schooling by attending Parent-Teacher Conferences, participating in the establishment of goals, communicating openly regarding student progress and challenges, and attending program meetings and open houses. Mountain West Montessori Academy will encourage – but not require – each family to contribute thirty (30) hours of volunteer service to MWMA each year. Family volunteer hours will not affect student opportunities to participate in school activities nor affect enrollment. We recognize that many charter schools struggle to reach this goal, but we believe that most parents want to be involved in their student's education. Experience has shown that many who fail to volunteer are simply unaware of the opportunities, or are unaware of opportunities that work with their schedule.

Examples of parent volunteer opportunities include but are not limited to:

Assisting at recess	Musical assistance
Playground monitoring	Computer support
At-home repair of student wear	Field trips
Daily cleanup	Fundraising
Classroom aid/support	Traffic/Parking lot assistance
At-home work for teachers	Home project assistance
Library assistance	Assisting with assemblies
Parent committees	Clubs and extra-curricular activities

Notification

The school may therefore establish a parental involvement committee that is responsible for working with the Director, teachers, and other parent committees to identify involvement opportunities and then notify parents of those opportunities. Teachers will also be encouraged to look for opportunities in which parents can assist them. Parents may be asked to respond to a survey to provide information about their availability to volunteer and to identify areas of interest or expertise that they can offer. Parents may be notified about volunteer opportunities through newsletters, notes sent home with students, e-mail, postings on the school's website, and personal invitation.

In addition, the school will seek to recognize the contributions that parent volunteers make to the school in order to provide positive reinforcement and encouragement to families and to create an environment that values parental involvement and promotes a sense of partnership with school personnel. Mountain West Montessori Academy believes that a partnership of this nature will enrich the education offered to our students, help students achieve greater levels of academic success, and provide students with great and lasting dividends.

Section 14
Employees

Plan for Hiring Qualified Administrators, Teachers, and Paraprofessionals

Director

Mountain West Montessori Academy (MWMA) recognizes that the day-to-day operation of the school is the Director's responsibility and that the Director is crucial in the success of the school. The Director will be responsible for implementing the school's mission and vision and creating a positive atmosphere of learning by hiring and leading the school's faculty and staff. The Director is also the key leader responsible for implementing school policies and procedures. The Director is responsible for setting the tone of the school, fostering healthy relationships with the local community, creating new traditions for the school, and maintaining the positive reputation of the school.

The Director must have a commitment to MWMA's mission and focus, and Mountain West Montessori Academy will look for the following preferred qualifications when hiring a Director:

Education: Master's Degree or higher in Education and/or Administration Certification in Utah

Experience: Significant administrative experience, preferable experience successfully leading a new charter school, preferable experience with Montessori charter school.

Knowledge of:

- Federal Elementary and Secondary Education Act (ESEA) requirements
- Utah State Core Curriculum requirements
- Utah charter school and public education laws
- Federal special education laws
- Budget management
- Implementation of standards-based curriculum
- Montessori educational methods and philosophies

Skills and Abilities:

- Ability to work effectively with all stakeholders including, but not limited to, Utah State Office of Education, Utah State Charter School Board, Mountain West Montessori Academy Governing Board of Directors, parents, parent committees, students, and the local community
- Ability to form productive relationships with students, families, and staff
- Experience in hiring
- Demonstrated success managing staff, including planning, motivating, encouraging, and providing targeted feedback and professional development
- Experience supervising and evaluating staff

- Flexibility to accommodate multiple priorities and a strong work ethic to accommodate a high level of responsibility
- Communication and interpersonal skills to provide clear leadership within a collaborative school environment.
- Experience managing schedules and budget to promote a school vision
- Commitment to the mission, values, and goals of MWMA

Assistant Director

Education and Experience: Masters Degree or higher in education or at least three years administrative experience, preferable experience with Montessori school.

Skills:

- Ability to form productive relationships with students, families, and staff
- Demonstrated success managing staff, including planning, motivating, encouraging, and providing targeted feedback and professional development
- Flexibility to accommodate multiple priorities and a strong work ethic to accommodate a high level of responsibility
- Communication and interpersonal skills to provide clear leadership within a collaborative school environment
- Commitment to the mission, values, and goals of MWMA

Teachers

The Director will be responsible for recruiting, interviewing, and hiring the teaching faculty under the direction of the Governing Board of Directors.

Mountain West Montessori Academy will follow all applicable requirements and regulations put forth by the Utah State Office of Education. All of the school’s teachers, paraprofessionals, aides and substitutes will be held to the appropriate standards needed for their positions. Specifically, all teachers hired by MWMA will have received a bachelor's degree at an approved higher education institution and will hold an appropriate license with areas of concentration and endorsements as approved by the Utah State Office of Education (See R277-510, R277-520, and R277-524) or shall be on track to complete the Alternative Route to Licensure (ARL) as provided in Rule R277-503. Teachers will have licensing as follows:

- Early childhood educators (grades K-3) shall hold a valid level 1, 2, or 3 license with an early childhood or elementary (grades K-6) license area of concentration.
- Elementary teachers (grades 1-6) shall hold a valid level 1, 2, or 3 license with an elementary license area of concentration.
- Secondary teachers (grades 7-9) shall hold a valid secondary level 1, 2, or 3 license with endorsements that correspond to the subject area that they are teaching.

Teachers at Mountain West Montessori Academy who work in NCLB core academic subject assignments will meet the following qualifications to be Highly Qualified:

- For grades K-3:
 - a bachelor's degree; and
 - an educator license with an early childhood area of concentration; and
 - a passing score at the level designated by the USOE on a Board-approved subject area test
 - preferable experience with Montessori school
- For grades 1-6:
 - a bachelor's degree; and
 - an educator license with an elementary area of concentration; and
 - a passing score at the level designated by the USOE on a Board-approved subject area test
 - preferable experience with Montessori school
- For grades 7-9:
 - a bachelor's degree; and
 - a secondary educator license with endorsement in appropriate area of concentration for subject being taught; and
 - a passing score at the level designated by the USOE on a Board-approved subject area test
 - preferable experience with Montessori school
- A teacher holding a license with an elementary area of concentration assigned to teach an NCLB core academic subject in Grades 7-9 shall meet the requirements of R277-510-3(A).
- For Special Education Teachers grades K-9:
 - a bachelor's degree; and
 - an educator license with a special education area of concentration; and
 - any one of the following in the assignment content area:
 - a passing score on a Board-approved elementary content test; or
 - a university major degree, masters degree, doctoral degree, or National Board Certification and an endorsement in the content area; or
 - a passing score at the level designated by the USOE on a Board-approved subject area test and an endorsement in the content area.
 - a special educator who would be NCLB Highly Qualified as a teacher of record in an elementary/early childhood regular education assignment is also NCLB highly qualified as a teacher of record in a special education assignment.
 - Teachers who work with students with disabilities will also meet the qualifications as outlined in IDEA 2004 in addition to the qualifications outlined in NCLB.
- For Counselors grades K-9:
 - a bachelor's degree; and
 - an educator license with a counseling area of concentration; and

- any one of the following in the assignment content area:
 - a university major degree, masters degree, doctoral degree, or National Board Certification and an endorsement in the content area; or
 - a passing score at the level designated by the USOE on a Board-approved subject area test and an endorsement in the content area.
- a counselor who would be NCLB Highly Qualified as a teacher of record in an elementary/early childhood regular education assignment is also NCLB highly qualified as a teacher of record in a counselor assignment.

The school's teachers will also either pass the Board-approved content test(s) or will satisfy Utah's HOUSSSE requirements for assignments and obtain a Level 2 license with standard license area of concentration as outlined in R277-510-5.

Following the above guidelines will ensure that Mountain West Montessori Academy meets the federal requirements for Highly Qualified teachers under the No Child Left Behind Act by hiring elementary/early childhood teachers that have a current Utah educator's license and by assigning that teacher a position consistent with his or her educator's license.

Paraprofessionals

Mountain West Montessori Academy will also follow all state and federal guidelines in regards to hiring qualified paraprofessionals for a program supported by Title I funds as outlined in R277-524. A "paraprofessional" is an individual who works under the supervision of a teacher or other licensed/certificated professional who has identified responsibilities in the classroom. Utah Administrative Rule R277-524 provides that:

- The individual shall have earned a secondary school diploma or a recognized equivalent; and
- The individual has completed at least two years (minimum of 48 semester hours) at an accredited higher education institution; or
- The individual has obtained an associates (or higher) degree from an accredited higher education institution; or
- The individual has satisfied a rigorous state or local assessment about the individual's knowledge of an ability to assist students in core courses under Federal Elementary and Secondary Education Act (ESEA); and
- The individual shall satisfactorily complete a criminal background check.

Both instructional and classroom aides are subject to the above-listed qualifications. In the event a teacher or paraprofessional is hired without being highly qualified, he or she will work closely with the Director and/or Assistant Director to develop an individual plan and timeline for achieving highly qualified status in a timely manner, but in no more than three years following initial hire. A detailed plan will be completed by the Director and/or Assistant Director with input from, and in agreement with, the individual which will be submitted to the Utah State Office of Education for approval. Individual plans must include the date for passing the Praxis test and taking any additional college courses required to receive Highly Qualified status.

Substitute Teachers

All substitute teachers at Mountain West Montessori Academy will have a minimum of a high school diploma or equivalent. However, preference may be given to applicants who have a bachelors or masters degree, and highest preference may be given to those who hold a current teaching license. All substitute teachers shall satisfactorily complete a criminal background check.

Plan for Hiring Process and Maintenance of Employee Files

Hiring Process

Mountain West Montessori Academy will internally or externally post available positions in an effort to hire the most qualified candidates for open positions. Candidate applications will be screened based upon criteria established by the Director. The Director will determine which applicants to interview. The school will schedule interviews, and the Director will conduct the interviews. Personnel other than the Director may be invited to participate in the interviews as appropriate.

Employment offers will not be made until satisfactory completion of reference checks. Once satisfactory results have been received from the reference checks, the Director will notify the selected candidate and extend the employment offer contingent upon successful completion of the background check. Background checks must be completed before the employee starts work.

On or prior to initial start date, new employees will sign an employment agreement and complete other required new hire paperwork. The Director will provide new employees with a copy of the Employee Handbook and review applicable policies and procedures. The signed employment agreement, application form, Form I-9 with copy of supporting I-9 documentation, Federal and state tax forms, and any certifications and licensure information is required to be submitted back to the school within three days from the employees hire date.

Any teacher or other staff member wishing to have volunteers work directly with students without direct supervision will be required to have his or her request for a specific named volunteer who has passed the necessary background check approved by the Director.

Employee Files

All individuals who will have significant unsupervised time with students will have a current file maintained at the school. Files will contain, but are not limited to, the following documents and information: criminal background check, signed and completed personal information sheet, application form, tax forms, signed employment agreement that includes job description and compensation and benefits term sheet, Form I-9 documentation, employee evaluation documents

discussed below in this section, and other employment-related correspondence. Employment agreements will be renewed yearly. These files will be maintained by the school office and will be held on file for not less than one year following the individual's departure.

Background Checks

In accordance with Utah Code 53A-1a-512.5 and in order to protect all students at MWMA, all of our staff, including administrators, office staff, teachers, paraprofessionals, instructional aides, classroom aides, substitute teachers, parent volunteers, Board Members, and community members who will spend any significant unsupervised time with students will submit to a criminal background check prior to beginning service. Only individuals whose background checks do not reveal offenses that the Director determines pose an unreasonable risk to the school community will be hired. Background checks will be renewed periodically throughout individuals' service with the school. The Director is responsible for ensuring that all background checks are complete and maintained in the school's employee files.

Job Descriptions

Director

Having a strong administrative team is essential for Mountain West Montessori Academy to attain the school's academic and character goals. The Director is the educational leader in the school. He or she will set the tone for a school climate that challenges and motivates students, teachers, and families to achieve academic excellence. The Director oversees the overall administration and management of the school, including academic programs, school vision, staffing, and culture development, with particular emphasis on planning and evaluation, policy and procedure development and administration, personnel and fiscal management, and parent and community relations.

The Director reports to the Governing Board of Directors and supervises all school staff. The Director will fulfill all responsibilities in accordance with state and federal law and follow best practices. The Governing Board of Directors will maintain the distinction between its governance responsibilities and the management responsibilities of the Director.

All employees of the school report to the Director, and the Governing Board of Directors will not directly supervise, direct, evaluate, discipline, or terminate any employees other than the Director.

The Director's responsibilities include but are not limited to:

- Instructional Leadership
- Curriculum Development
- Supervision and Improvement of Instruction
- Monitoring Student and School Progress and Performance and Interpreting Results
- Community Relations
- Staff Professional Development
- Employment Issues
- Student Discipline
- Student Placement
- Responsibilities for Facilities
- Management of School Equipment and Supplies
- Preparation and Completion of Federal and State Reports
- Assistance and Support to Teachers

More specifically, the Director has the following responsibilities to the various stakeholders in the school community:

Director's Responsibility to the Governing Board of Directors

- Achieve vision of the Governing Board of Directors
- Establish & implement board-approved curriculum and assist the Governing Board of Directors in identifying and solving problems
- Develop organizational goals and objectives consistent with the mission and vision of Mountain West Montessori, the charter application, and state and federal requirements
- Evaluate effectiveness of programs and systems
- Communicate and carry out established policies, delegate and accept responsibility for completion of tasks and communicate program goals, objectives and policies to the school community
- Identify, carry out (using proper protocol as outlined in staffing policy) and report all hiring and termination activities to the Governing Board of Directors
- Assist the Governing Board of Directors in preparing the annual budget and any necessary budget revisions
- Adhere to and properly administer approved budget
- Collaborate with the Educational Service Provider and Governing Board of Directors on the budget and legal compliance issues
- Keep the Governing Board of Directors apprised of issues impacting the school's development
- Maintain positive relationships with community organizations, businesses, other schools, USOE, and the Utah charter community

Director's Responsibility School Wide

- Oversee the day-to-day management of the school and the effort to ensure the health and safety of all students, faculty and staff

- Oversee the student recruitment and enrollment process and ensure compliance with state and federal law
- Effectively implement the Montessori method of instruction
- Properly procure supplies, including following federal and state procurement procedures and internal auditing requirements
- Develop and maintain processes and procedures for a safe and orderly school
- Establish operational procedures, such as: check-in of students and visitors, pick up/drop off, dress code enforcement, attendance, emergency response
- Model a commitment to ongoing professional development by participating in conferences, institutes, summits, trainings, etc.
- Ensure compliance with full scope of government regulatory requirements
- Establish assessment strategies to ensure academic goals are met and AYP is achieved
- Develop and maintain open channels of communication with students, parents, staff, and community members
- Maintain positive public relations with parents, community, local school district and Utah State Office of Education

Director's Responsibility to the Employees

- Recruit, select, and hire all school staff, including Assistant Director, teachers and support staff
- Create an effective school team responsible for achieving school goals and committed to excellence
- Oversee the successful implementation of professional development programs to meet the needs of staff at all levels of development
- Oversee the development and implementation of personnel policies and procedures
- Develop and maintain an Employee Handbook
- Promote and maintain a culture of open and respectful communications with established lines of authority
- Maintain personnel files
- Evaluate staff and teacher performance, including informal reviews and an annual formal evaluation of performance
- Work with teachers to continually assess and evaluate teaching performance and results, including observing classes regularly, providing feedback, and coaching
- Emphasize research-based best practices and data-based decision making

Director's Responsibility to the Parents

- Maintain open, effective and respectful communications with parents
- Help parents to understand and support the school's vision and mission
- Coordinate with parent volunteers and committees
- Develop and maintain a Parent and Student Handbook
- Work with parents to achieve maximum involvement in support of student success

Director's Responsibility to the Students

- Promote and maintain open communication with students
- Promote positive student attitudes as well as respect and dignity among students
- Develop and maintain a Parent and Student Handbook
- Oversee adequate assessment of students and ensure road map for continual improvement
- Perform duties related to student discipline

Assistant Director

Under the direction and supervision of the Director, the Assistant Director's job duties will include management duties that require the use of sound, independent judgment. In addition, the Assistant Director will play a lead role in the development of school curriculum, the improvement of instruction, and assessment.

Additionally, the Assistant Director will:

- Assist Director in his/her responsibilities
- Act for the Director in the Director's absence, including attending internal and external meetings, conferences, activities and events
- Assist in recruitment and hiring activities
- Assist in training and professional development activities
- Assist in student discipline matters
- Coordinate and assist in teacher evaluations
- Participate in long-range planning efforts with the Director and others
- Establish and maintain effective and collaborative working relationships with all staff, students, families, the USOE, the public and representatives of the community
- Perform other related duties as requested by the Director

Special Education Teacher

Special education is a key area that requires additional support to the Director. Responsibilities for this position include:

- Develop policies, programs, and other standards within the special education program, as well as representing the program to the community and the school's administration
- Assist in hiring, training, discipline and other concerns involving special education personnel
- Maintain teaching license through professional development opportunities
- Identify, develop, and provide professional development in Special Education areas for school staff throughout the year
- Coordinate, conduct, and interpret formal and informal base measures
- Attend parent teacher conferences
- Create Individualized Educational Plans (IEPs) in accordance with federal and state laws that are specific appropriate to the needs of students
- Coordinate, attend, and facilitate IEP meetings
- Develop and implement individualized instruction

- Co-teach academic curriculum in the general education setting
- Collect data on student behaviors
- Conduct Functional Behavior Assessments (FuBAs)
- Develop Behavioral Intervention Plans (BIPs)
- Monitor student progress and communicate information to parents

Teacher

- Support the policies, curriculum, mission, administration, and governing board of the school
- Develop lesson plans that correspond with the curriculum
- Perform instructional duties as prescribed by the Director, as set forth in the school’s Teacher Handbook and in accordance with the requirements of the Utah State Office of Education
- Participate in workshops and other professional development activities
- Act in a professional, respectful manner whenever conducting school business, or when it is reasonably expected the teacher would be viewed as a representative of the school, whether teacher is on or off school grounds
- Maintain a positive attitude and demeanor at all times when representing the school – both on school property and off school grounds
- Comply with policies and procedures
- Endeavor to work collaboratively with colleagues by sharing best practices, mentoring, conversations, modeling, and actively engage in professional development activities
- Maintain a positive classroom environment

Paraprofessionals

- Perform instructional duties as prescribed by the Director, in accordance with the school’s policies and procedures and in accordance with the Utah State Office of Education’s requirements
- Support the policies, curriculum, mission, administration, and governing board of the school
- Assist the head teacher by:
 - Reinforcing concepts introduced during the lesson plan
 - Emphasizing relevance of course content
 - Directing students to additional resources
 - Answering questions
 - Stimulating interest and enthusiasm
 - Encouraging student initiative
 - Interpreting and enforcing classroom policies and procedures
 - Maintaining clear and complete records
- Assist in the implementation of lesson plans provided by the head teacher or Director
- Act in a professional, respectful manner whenever conducting school business whether on or off school grounds
- Report concerns regarding students, parents, employees, and curriculum to the Director or designated person
- Perform additional duties, when needed, as prescribed by the Director or head teacher

Head Secretary

Although the ultimate decision regarding the staffing of the school's front office will be at the Director's discretion, it is anticipated that the school will have a head secretary. The head secretary reports to the Director and provides both administrative and clerical support to the Director and the staff. The school secretary maintains a professional and organized front office and directs staff, students and parents to the appropriate party, as well as supervising any other secretarial staff. Responsibilities for this position include:

- Welcome and assist visitors, screen unexpected visitors in accordance with predetermined policy
- Interact with all individuals in a positive manner
- Receive and route all incoming calls
- Provide timely messaging support for all staff
- Maintain a schedule of appointments and make arrangements for conferences, interviews, and special event needs
- Provide teacher support through absentee notification, parent mailings, arranging conferences, and other duties as requested
- Order and verify receipt of supplies and other materials within established time and budget constraints
- Maintain general supply inventory to ensure necessary materials are available to staff when needed for classroom, administrative, and custodial support
- Maintain appropriate student and administrative records according to federal, state, and local school policy including student and employee attendance, grades, transcripts, student records, etc.
- Collaborate as a team player with colleagues & administrators
- Attend and prepare for faculty, department, or educator team meetings as requested by the Director
- Provide for timely agenda and handouts for meetings
- Model self-discipline and ethical behavior
- Present self in a professional and positive manner through appropriate dress, communication techniques, and demeanor
- Consistently support and uphold school policies and procedures
- Support the mission and vision of the school, its teachers and its leadership
- Perform other duties as requested by an administrator

Plan for Employee Evaluation

Mountain West Montessori Academy will work to create a professional environment where review and critique by peers and supervisors are expected and welcomed in the pursuit of educational excellence for the school's students. Mountain West Montessori Academy will seek to hire and retain the most qualified employees who support the mission and vision of the school.

In order to accomplish the MWMA mission, employees must be highly motivated, innovative, and talented in their respective duties. Effective employee evaluation will be a key in ensuring that employees are reaching their potential and that they contribute to accomplishing the school's educational mission.

Director Evaluation

The Director will be reviewed by the Governing Board of Directors or a committee of the Governing Board of Directors approximately mid-year and will receive a formal review at the end of the school year.

At the beginning of each school year, the Governing Board of Directors or a committee of the Board will meet with MWMA's Director to discuss the Governing Board of Director's priorities for the year and to work with the Director to set personal and professional goals in alignment with the school's vision.

The Director will be informally reviewed by the Governing Board of Directors or a committee of the Board mid-year and will be formally reviewed at the end of the school year. These reviews will evaluate the Director's progress towards meeting goals and give objective feedback to the Director in areas relating to vision alignment, staff development, student success, community outreach, leadership, and other areas the Governing Board of Directors sees fit.

The Director evaluation tool will be developed and adopted by the Governing Board of Directors. The Governing Board of Directors may consult established standards such as the Interstate School Leaders Licensure Consortium (ISLLC) and the USOE's Educational Leadership Tool to develop the Director's evaluation tool. Teachers and staff may also periodically be solicited to provide feedback on the Director through an anonymous survey. These survey results may be reviewed at the formal review between the Director and the Governing Board of Directors or a committee of the Board.

Results of the formal annual review, including any recommendations for improvement or remediation, will be put into writing, signed by the President of the Governing Board of Directors, and placed in the Director's Personal Development Portfolio and the School's personnel file.

Teacher Evaluation

Mountain West Montessori Academy's Director will develop an evaluation tool for teachers. The evaluation tool will incorporate the mission and philosophy of the school and assess teachers' implementation of Utah Core Curriculum. The Director will continue to revise and

refine the evaluation tool in order to ensure that it adequately and appropriately measures key aspects of teachers' effectiveness.

The evaluation process takes place over the course of the entire year. At the beginning of the year, the Director or Assistant Director will introduce employees to the current evaluation tool, discuss the methodology used in the evaluation process, and review job descriptions and expectations. Prior to the start of the school year, teachers will prepare a professional development plan and associated goals in consultation with the Director and/or Assistant Director. Goals will be divided into four main areas: Curriculum & Assessment, Pedagogy, Classroom Management, and Professional Development.

The Director and/or Assistant Director will conduct at least one formal teacher observation each year for Level 2 and 3 teachers and at least two formal teacher observations for Level 1 teachers.

During the school year, the Director and/or Assistant Director will observe and assess the following criteria: classroom management skills, knowledge and implementation of the curriculum and mission of MWMA, instructional effectiveness, grading practices and organization, and professional practices.

Formative Evaluation Components

The ongoing assessment carried out by the Director, Assistant Director and mentor teacher, if applicable, both formally and informally throughout the year constitutes the formative component of teacher evaluations. Mid-year evaluations or reviews will focus on making progress, including improving the teacher as well as improving the instruction methods, curriculum and communication.

The Director may regularly observe classrooms to monitor teacher performance and student responses. Items observed may include review of lesson plans, teacher preparedness and ability to answer student questions, student engagement, and classroom management. Teachers may also be given opportunities to observe the mentor teacher or other teachers in practice on a yearly basis as part of the evaluative process.

At any time during the year, the Director, Assistant Director and/or a mentor teacher, if applicable, may meet with a teacher to review teacher and/or student performance, discuss instructional practices and, if necessary, recommend remediation to help the teacher make any required changes or improvements.

Each teacher may have a pre-conference with the Director, Assistant Director and/or a mentor teacher, if applicable, prior to any mid-year evaluation to review lesson plans and become aware of special considerations.

Summative Evaluation Components

The end of the year evaluation will reflect on and evaluate performance during that school year. This is the summative component of the evaluation process and is the major factor in determining continued employment and compensation.

The evaluation standards will be based on Utah Professional Teacher Standards Continuum of Development, which evaluate a teacher's performance level using a continuum. The evaluation will examine teachers' progress towards goals set earlier in the year. The teacher's mastery of Montessori methods of instruction will be included in this evaluation.

To encourage parental involvement, parents may also play a role in the employee evaluation process by being invited to complete periodic teacher evaluation surveys. Using appropriate survey methods, including anonymous electronic surveys, parents may be asked to provide anonymous input concerning their students' teachers. The Director will review survey results and, as appropriate, Governing Board of Directors, and appropriate data may be used to support summative evaluations. This avenue for input is aligned with "T" in the Charter School Assurances.

Summative evaluations will also include student academic data appropriate to the goals set by teachers.

Results of formal reviews will be put in writing, signed by the employee and the Director, and placed in the employee's personnel file.

If, as a result of an observation or review, the Director determines that a teacher is performing unsuccessfully, the Director may require the teacher to undergo remediation and may set specific expectations for the remainder of the school year. Any such remediation does not alter the at-will nature of the employment relationship.

The teacher may receive more frequent observations and/or evaluations as needed.

Support Staff Evaluation

The support staff should also be part of the culture of excellence at MWMA. Support staff will have access to the Director and Assistant Director at all times, and the Director and/or Assistant Director will conduct evaluations for the support staff on an as-needed basis throughout the year.

In addition, the support staff will be evaluated each year by the Director and/or Assistant Director in a year-end evaluation interview where old goals are reviewed and new goals are mutually determined. Teacher surveys of support staff performance may also play a role in the

annual evaluation.

Entry Years Enhancement (EYE)

Mountain West Montessori Academy is committed to the professional development of its staff. The school will therefore follow closely all of the requirements of the EYE program for quality teaching as outlined in the administrative rules governing EYE, Utah Administrative Code R277-522-3. The purpose of the EYE requirements is to develop in Level 1 teacher's successful teaching skills and strategies with assistance from experienced colleagues. Each Level 1 teacher will work with the school's Director or Assistant Director to develop a professional development plan that demonstrates the teacher's progress towards obtaining "Highly Qualified" status as defined under ESEA. First, each Level 1 teacher will be assigned a mentor teacher who has a level 2 or 3 license. The assigned mentor will supervise and act as a resource for the entry-level teacher, as well as serve as a means to evaluate the Level 1 teacher. Second, Mountain West Montessori Academy will ensure the Level 1 teacher can pass the Praxis II exam. Third, with the assistance of the Mentor, the school will create a written evaluation of the Level One teacher's performance during the year. Lastly, Level 1 teachers will compile a portfolio of student's products and personal performance, as well as be required to present the portfolio to the Director.

Employee Remediation and Dismissal

Maintaining quality staff is important to Mountain West Montessori Academy because quality staff is essential for the accomplishment of the school's mission. The school recognizes that mentoring, professional development, and teacher collaboration will be integral to creating a professional atmosphere conducive to achieving the desired results.

The school is committed to working with and mentoring staff members to achieve professional development goals. However, even with an excellent atmosphere, not every employee will meet the school's performance standards at all times. The school believes that working with employees to identify the need for improvement through warnings or reprimands, establishing a plan for improvement, and then holding the employee accountable to the plan demonstrates respect for the individual and can be a highly effective means of improving performance in many situations. When the Director determines that an employee's performance does not meet acceptable standards, the Director will document the feedback and the plan for improvement (the sample *Record of Corrective Action and/or Communication Expectation* Form from the Utah Division of Risk Management is an appropriate form for this purpose).

In order to avoid compromising the school's at-will employment status, MWMA will not implement a formal progressive discipline or corrective action system. As such, employees should not have an expectation that these steps will be applied in any given situation. The

school's Director will have the discretion to apply the steps of warnings, reprimands, and accountability plans as appropriate in a given situation.

It is the Director's responsibility to maintain staff morale and develop effective educators; however, the Director will have the authority to terminate staff as he or she sees fit. In the event that the Director requires an improvement in performance from an employee, he or she will make a good faith effort to help the employee improve before terminating the employee, so long as such actions will not have a significant negative impact on students or overall staff morale. The key consideration in making such decisions will be the best interest of the students and accomplishing the school's mission.

Salary Increases and Bonuses

From year to year, salary increases may be based on factors such as the outcome of each staff member's employee evaluations, the experience and education level of licensed staff, extra duties performed, and budget projections.

Bonuses may be awarded for continued education, professional development, and other criteria set by the Director.

The Governing Board of Directors may establish a compensation philosophy as a policy to guide the Director in setting salaries and awarding bonuses.

At Will Status

Under Utah State Law, Mountain West Montessori Academy is exempt from the Utah Orderly Termination Act. All school employees are at-will employees and have no expectation of continued employment. Nothing contained in the charter application is intended to create, or can create, any contractual or other legal rights for employees. Employment by the school remains at-will. All procedures and practices set forth in this application or elsewhere are employed at the discretion of the Governing Board of Directors and its designee(s). Nothing contained herein creates any expectation of continued employment.

Employment of Relatives

Mountain West Montessori Academy will follow all federal and state laws, including but not limited to Utah Code § 53A-1a-518, regarding the employment of relatives and conflicts of interest. The school's proposed Employment of Relatives Policy and Conflict of Interest Policy are included in **Attachment F**.

Terms and Conditions of Employment

Mountain West Montessori Academy will endeavor to publicize and attract applicants who are qualified and exhibit passion and aptitude for teaching in a rigorous environment using the school's pedagogical approach. Mountain West Montessori will select its personnel directly and in compliance with all Federal and State rules and regulations. The school will terminate employees only when it is in the best interest of the students and in order to more fully accomplish the school's mission.

All employees at MWMA are considered at-will, and may be terminated at any time with or without cause. Offers of employment will be made in writing which, if accepted, are signed and returned to the school. Accepted offers establish and acknowledge an agreement to an at-will employment relationship between the employee and MWMA. The agreement outlines the job requirements, pay, benefits, and hours of work. Employment offers should be renewed yearly for all employees, including the Director. MWMA will ensure that the employment agreement does not jeopardize the school's at-will status.

Mountain West Montessori Academy is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act Amendments Act (ADAAA), Mountain West Montessori Academy will not discriminate in any employment practices against a qualified individual with a disability nor discriminate against an applicant or employee based on race, color, national origin, religion, and gender in all terms and conditions of employment, whether disabled or not, or because of the individual's family, business, social or other relationship or association with an individual with a disability. The school will provide reasonable accommodations as required by the ADAAA. Employment decisions will be based upon relevant job criteria; and in compliance with ADAAA, the school will not retaliate against an applicant or employee for asserting his or her rights under the ADAAA. The school will follow all applicable state and federal employment laws.

The Director and the Governing Board of Directors will seek counsel and assistance from qualified legal and human resources professionals when employment issues arise in order to ensure that the school conducts itself in accordance with the law. The school will create an employee handbook containing the school's employment policies and procedures. The handbook will be updated as necessary and will be distributed to all employees annually. Employees will sign to verify that they have received a copy of the handbook. The school will provide employees with required trainings for issues including, but not limited to: sexual harassment awareness, prevention and reporting, discrimination, blood borne pathogens, Worker's Compensation, Legal Liability, or policies as requested by the Director.

All employees will be held to the same professional standards while in the presence of children and parents and will be expected to follow them. The Director will evaluate employees'

performance and professionalism and determine if it is in the best interest of the school, the students, and the overall mission and vision of the school to discipline or terminate an employee at any given time. When performance or conduct does not meet acceptable standards, the school may terminate an employee, or it may—but is not required to—if it deems appropriate, provide the employee a reasonable opportunity to correct the problem.

All teachers will be required to maintain their license and other credentials appropriate to their position.

Mountain West Montessori Academy will support and nurture good teaching practices in all teachers. Our goal is to retain and develop high quality, effective teachers.

The following is a non-comprehensive list of reasons for termination or discipline. MWMA retains the right to terminate employment with or without cause and to determine whether cause for termination or discipline exists, regardless of whether such cause is included in this list.

- Falsification of information supplied to the school, including but not limited to application information, employment data, reports, and testing data; Insubordination, which is defined as —refusal to obey a directive which a supervisor is entitled to give and have obeyed;
- Improper or unlawful physical contact with students;
- Manufacturing, possessing, using, dispensing, distributing, selling, and/or engaging in any transaction or action to facilitate the use, dispersal, or distribution of any illicit (as opposed to authorized) drugs or alcoholic beverages on school premises or as a part of any school activity;
- Possessing, viewing, or distributing pornographic material (printed, electronic, or otherwise)
- Failure to obtain or maintain an appropriate license;
- Theft of school property;
- Inability or failure to perform essential job functions despite reasonable accommodations;
- Evident unfitness to perform teaching duties;
- Violation of school policy which is of sufficient gravity to warrant disciplinary action or termination;
- Conviction of a crime which has a rational nexus to education;
- Conduct which is harmful to students and which is of such a negative nature that it warrants disciplinary action or termination; and
- Any reason the Governing Board of Directors or its designees(s) in its sole discretion deems reasonable and appropriate and as pertains to the vision and mission of MWMA.

Nothing contained in this section is intended to create, or can create, any contractual or other legal rights. Teachers will be employed for an indefinite period and in an at-will capacity. This means that both the school and the Teacher retain the right to end the relationship at any time, with or without notice, and for any reason or no reason at all. Nothing contained herein creates any expectation of continued employment.

Additionally, the Governing Board of Directors may choose to adopt a formal Employee Grievance Policy similar to the sample policy contained in **Section 12, Attachment E**.

Section 15 Services

Administrative Services Plan

Mountain West Montessori Academy (MWMA) has designed an Administrative Services Plan that supports its unique mission, values and teaching philosophy. The administrative team of Mountain West Montessori Academy will consist of a Director, Assistant Director, Special Education Teacher, and Counselor. A part-time Counselor will be hired in year one; year two the Counselor will become full-time and an Assistant Director will be hired. Qualifications and job descriptions for these positions are set forth in **Section 14, Employees**.

The various aspects of the administrative services necessary for the school to function have been divided into the following four areas: Educational Programs, Support Services, Facility Services, and Business Services. Resources have been committed for each of the four areas and are incorporated into the Budget and Detailed Business Plan sections. Until the administrative team is complete in year two, the rest of the administrative staff, Governing Board of Directors, faculty members and the business manager or Educational Service Provider (ESP) will share additional responsibilities to sufficiently support the Director. Each area of the Administrative Services Plan is explained below in terms of its Functions (areas of oversight) and which personnel are assigned responsibilities in that area.

Educational Programs

The key components of MWMA's Educational Programs are Professional Development, Curriculum and Assessment. The Director will take the lead in requiring the use of Montessori teaching methods to improve student learning and in providing appropriate educational resources to the faculty. The Director will ensure that faculty and other staff receive necessary training in Montessori teaching methods and philosophy. Additional administrative support in this area is provided by the Assistant Director, Special Education Teacher and Counselor. Specific areas of responsibility for the Educational Programs are listed below.

Functions	Responsibilities	Assignment
Instructional Leader/ Curriculum Consultant	Train in Montessori methodology Assist with curriculum development Ensure curriculum exceeds state core requirements Stay current on innovative teaching methods	Director Assistant Director
Supervision and Improvement of Instruction	Provide on & off-site professional development Conduct evaluations & mentoring Provide assistance and support to faculty members Review student and teacher portfolios	Director Assistant Director
Interpretation of Student/School Performance	Monitor student and school performance & progress	Director Assistant Director
Professional Development	Ensure all staff has a Professional Development plan Provide on & off-site training opportunities	Director Assistant Director
Special Education	Support school-wide program development	Special Ed Teacher Director Assistant Director
Student & Staff Counseling	Assist with development of assessments & diagnostics	Counselor Director Assistant Director

Support Services

The Director will oversee all Support Services, which are the Functions that support the educational programs in the school. As such, the Director is the student advocate and parent liaison and endeavors to create positive relationships between the school and other organizations within the community. The Director is ultimately responsible for the positive school culture. The Director receives additional administrative support from the Assistant Director, Governing Board of Directors, and business manager or ESP. Specific areas of oversight and responsibilities for Support Services are listed below.

Functions	Responsibilities	Assignment
Employment Issues	Recruit, interview, and hire faculty & staff Supervise faculty & staff Revise the Faculty Handbook Recommend faculty raises Recommend termination of faculty & staff Discipline faculty and staff	Director ESP
Teacher Support/Assistance	Conduct staff evaluations Provide staff mentoring	Director Assistant Director
Student Advocate	Oversee student enrollment & placement Develop/Support school discipline policies Revise Student Handbook Oversee student fees Coordinate student activities	Director Assistant Director Parent Volunteers
Parent Liaison	Coordinate volunteer program Oversee and/or conduct parent education programs	Director Assistant Director
Records Management	Coordinate student information management	Head Secretary ESP
Certification Verification & Background Checks	Conduct volunteer BCI's Verify teacher certification via CACTUS	Head Secretary ESP
Community Relations	Develop community relationships	Director Governing Board
Safety	Develop emergency response plans and other safety procedures Monitor facility safety Document and report incidents	Director Assistant Director Head Secretary

Facility Services

Facility Services includes functions necessary for the school to be kept safe and in good repair. Many of these responsibilities will be contracted out to other providers and will be overseen by the Director, assisted by the business manager or ESP. Managing equipment and supplies is also part of Facility Services and is managed by the Director and business manager or ESP to ensure responsible use and care of school assets, facilities, and funds. Additional administrative support is provided by the Head Secretary and Parent Volunteers. Specific areas of oversight and responsibilities for Facility Services are listed below.

Functions	Responsibilities	Assignment
Operation & Maintenance of School Building (contracted)	Custodial services Maintenance services	Director ESP
Manage IT/Infrastructure (contracted)	IT services	Director ESP
Manage Equipment & Supplies	Oversee inventory levels & other assets	Head Secretary Parent Volunteers ESP

Business Services

As discussed more fully below in this section, the school intends to hire an ESP to assist in the functions included in the Business Services area. The functions include business and fiscal management, ensuring responsible use and care of school assets, facilities, and funds via required reporting, accounting, budgeting, purchasing, etc. Specific areas of oversight and responsibilities for Business Services are listed below.

Functions	Responsibilities	Assignment
Preparation & Completion of Federal & State Reporting	Execute reporting for managerial & statutory requirements Coordinate annual financial audit	Director Governing Board ESP
Accounting	Maintain timely and accurate accounting records Prepare financial statements Report budget vs. actual and itemized expenses to board on a monthly basis Ensure adequate internal controls Manage budgeting and purchasing processes Manage school's financial assets Update accounting policies and procedures Attend School Finance & Statistics training	Director Governing Board ESP
Employment Issues	Manage Payroll, Benefits, and Human Resources Ensure compliance with federal and state employment laws	Director Governing Board ESP
School Lunch Records	Manage and submit data, as needed	Head Secretary ESP

Budget for Administrative Services

The proposed budget for the school allocates adequate funding for the administrative services plan, library plan, and technology plan described in this section.

Director – The school budgeted for an annual salary of \$68,000. The planning year budget contains a six-month salary of \$34,000 for the Director.

Special Education Teacher – MWMA budgeted for one full-time Special Education Teacher and a half-time assistant at salaries of \$38,000 and \$16,000 annually, respectively.

Secretary – The MWMA budget provides for one full-time head secretary/office manager plus another half-time secretary at a \$25,000 annual salary for the full-time position and \$12,500 for the half-time position.

Counselor – The school budgeted for a half-time Counselor at a salary of \$16,000 the first year.

Custodial Services – The budget contains \$30,000 for custodial services.

Educational Service Provider (ESP) – MWMA has budgeted \$189,600 in year one for an ESP. If the school elects not to contract with an ESP, this amount should be sufficient to procure the necessary services through other means.

Library Plan

Mountain West Montessori Academy (MWMA) will promote the use of a variety of literature and media that will enrich and enhance teaching materials and students' educational experience by housing a Library Media Center. MWMA's Library will comply with Northwest Accredited Commission (NWAC, 2011) Library Information Services Standards set by the, 6.17-6.20, and as required by Utah State Code R277-410(3)(c). The current NWAC standards will be the AdvancED Standards for Quality in the 2014-2015 school year. The MWMA application will continue to reference NWAC as the accrediting commission. These standards include having a certified Media Specialist, providing regular and frequent access to the library for students and staff, allowing various resources and technologies, and the establishment of policies for the section and removal of resources, as well as the internet usage.

The mission of MWMA is to provide individualized educational programs 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. The library's resources and technologies will be utilized to further carry out the school's mission; this is the vision of the MWMA Library and will be promoted by the following two goals and respective objectives.

Library Plan Goals		
Goal	Objective	Activities/Measures
MWMA's Library will promote literacy.	Schedule all classes weekly library time and extend hours	Classes have been assigned a weekly library time and an open door policy has been adopted
	Provide a broad selection of quality printed materials	Library budget is sufficient to meet the Library collection's need
Enhance cross-curricular research and student-centered projects	The Media Specialist will have available upon request materials to supplement core curriculum lessons	Lesson plans
	The Library will have a variety of research methods	Positive feedback from parents, staff, and students
		The Media Specialist will provide instruction on accessing reference materials

Staffing

MWMA intends to hire and maintain a full-time certified Media Specialist during the school day and an additional media center personnel that may include paraprofessionals and/or parent volunteers to assist in resources check in/out, literature circles, small group instruction, as well as assisting students with the Pioneer Online Database and other instructional and reference resources within the Media Center/Library. MWMA's proposed budget reflects this certified Media Specialist and paraprofessionals. The certified Media Specialist in conjunction with the classroom teacher, will use the student learning goals identified on the UEN website. The Media Specialist and paraprofessional will be supportive and knowledgeable about the standards and expectations of MWMA's mission and the Library's vision. They will promote independent learning, problem solving skills as well as student directed literacy projects, higher order thinking skills, and opportunities for leadership and peer collaboration within the Library environment.

The certified Media Specialist will be responsible for advocating the mission and philosophy of the school through library activities. This will involve providing support and cooperative learning experiences for students, teachers, and staff. MWMA hopes to accomplish their goals by scheduling library time each week of the school year and the Media Specialist will provide both grade and age appropriate instruction teaching the concepts of the core curriculum to the students.

The Media Specialist will instruct whole-class groups, small groups, and individual students in using print and online research resources. Integration of these library and research concepts can be extended into the classroom and the home when teachers support this instruction by giving

students assignments where library time and skills will be required both at home and in the classroom. The Media Specialist will also be asked to conduct professional development sessions on library resources, including curriculum-related print materials, electronic resources, computer applications, and equipment use.

Acquisition of Books and Materials

MWMA's Library collection will include print, non-print, and electronic materials built on a foundation of scholastically recommended books, consisting of classic children/young adult literature and local periodicals reflecting students' individual reading levels and interests. It will also include a variety of age-appropriate fiction, non-fiction, and reference materials as well as various forms of multi-media learning resources. Students, parents, and teachers will be able to find up-to-date information on subjects in which they are interested. These tools will allow the Library to maintain the school's vision of ongoing learning, meeting the needs of all students and giving students multiple opportunities and resources for academic growth and success.

The Library is budgeted to have one computer and one printer during the first year for the Media Specialist with circulation software installed as well as an office suite for email, spreadsheets, and word processing needs. The MWMA technology plan includes eleven additional computers as well as a printer. It is anticipated these computers and printer will be available for student use in the Library for research purposes, small group instruction, testing, etc. The technology plan also includes two digital televisions, two DVD/Blue-Ray players, and six LCD projectors that will be available for library use or classroom check-out.

Library Financial Plan and Budget

MWMA's Library will have an annual, ongoing budget that ensures the continuing development of a balanced, relevant, and current print and non-print collection, including supplies and operational materials. As indicated in the Budget (**Section 6**), MWMA has budgeted in an amount for Library Instructional Books and Periodicals. The budget is sufficient to guarantee that the Library's collection (both print and non-print) will be annually renewed at a minimum rate of 5%. Equipment and software required to access and use current electronic resources will be funded as part of MWMA's Technology Budget. Since one-time federal, state, or other grant funds can supplement the Library's budget, MWMA intends to apply for grants that may be available allowing additional funding for the Library. Fundraising activities may also be used to raise additional library funds such as book fairs, book exchanges and donations, business partnerships, read-a-thons, and family or other private financial donations.

Library Policy

The certified Media Specialist, working in conjunction with the school's Director, may develop a formal written procedures, to guide and assess the Library's program and personnel, which will

be in accordance with any library policies approved by the MWMA Governing Board of Directors. These policies and procedures will be tools that allow for the continual evaluation of the quality, depth, and breadth of the Library program. Policies and procedures will include, but is are not limited to the following elements: a statement of philosophies and general policies; a challenged materials statement and procedure; an acceptable use policy and document for students and staff; and a guide for collection development, including weeding. The procedures may also include general information for the daily operation of the Library, policies regarding fines, damaged materials, etc. The policies and procedures will be reviewed and revised as necessary.

Facilities

MWMA's Library will be inviting and conducive to student learning and accessible to all by being located in an area of the building that is easily accessible to all students in accordance with federal law (ADA, IDEA). The environment will be aesthetically pleasing in its arrangement of furniture, title stacks, study/working and reading areas while maintaining a physical organization that allows students to easily access the resources needed, and permits the Media Specialist to readily see and supervise all library activities such as small group instruction, computer usage, and student interactions. Proper lighting for designated areas and tasks will be installed as well as sufficient electrical and networking outlets to accommodate the Library's technology and allow for rearranging of library resources. The Library space will be configured in such a way as to facilitate activities associated with the Library. Whiteboards, projection screens, and LCD projectors will serve as important instructional delivery tools that will be utilized by the certified Library Media Specialist. In addition, small group tables in the Library will allow implementation of Montessori's instructional methods. The Library will also have a multipurpose space that may be used for read-alouds, puppet shows, storytelling, group literacy-building instructional activities, school board meetings, and after-school clubs. The Library will also include the Audio/Visual room for storage of the mobile laptop carts, the television, portable projectors, instructional videos/DVD collections, etc.

Technology Plan

“What purpose would education serve in our days unless it helped humans to a knowledge of the environment to which they have to adapt themselves?”

-Dr. Maria Montessori (American Montessori Society Position Statement on Technology)

Mountain West Montessori Academy is committed to providing its educators, students and parents the technological resources they need to ensure literacy, numeracy, high quality instruction, and relevant curriculum alignment with the Utah State Board of Education's Technology Standards (2012). MWMA recognizes the importance in the proper and effective

use of technology for assessing student progress, data collection, analysis, and for use as a guide to continuous improvement of teaching and learning. MWMA’s mission is for students to have hands-on experiences by receiving exposure to technology aiding them in the real world environment.

Charter School:	Mountain West Montessori Academy
Director:	TBD
Technology Coordinator:	Technology Committee

Technology Description

Technology will be used to enhance the mission of the school for student-centered learning and intellectual curiosity, consistent with the Montessori Philosophy. Technology such as tablet devices, wired desktops and wireless mobile computer labs with Internet access, interactive whiteboards, LCD projectors, and audio enhancement systems may be integrated into the teaching and learning at MWMA. The school’s technology will help students develop their intellectual abilities and curiosity as well as provide opportunities for individualized student work projects and hands-on experience with computers. Frequent exposure to technology and computers is essential for the students to practice skills and become proficient in the application of technology. Students exposed to technology at MWMA will gain experience in knowing when technology can be used to solve problems.

Technology should allow children to follow their own interests, to learn as appropriate to their individual styles, and to achieve independence as lifelong learners. In the Montessori classroom, students are free to work independently or in small groups; whether working with manipulatives or working with computer technology. One or two computers/tablets available as a “computer station” in the classroom could be an activity center for student work. A daily individual work plan for a student might include practicing computer or keyboarding skills, researching a subject, or preparing a report. The integration of technology into the classroom mirrors the integration of technology into the adult workplace, providing students with real-world experience.

Lower elementary (K-3) focuses heavily on the use of didactic instruments for learning core concepts. Technology can be used in these grades to introduce abstract ideas as well as to provide a window to the world. Students may be introduced to different cultures and countries, and to how other children of similar age live, study and play. Technology will allow the presentation of pictures, videos, sound bites, and interactive maps for exploration of the depths of the ocean to the far reaches of outer space. In addition technology in these younger grades will focus on interactive forms that allow the students to develop their curiosity, problem solving skills, critical thinking, and independent thinking skills.

In the upper elementary (grades 3-6) and junior high grades, it is envisioned initially that a computer station consisting of two to four mobile computers or tablet devices will be available.

In time, tablet devices will be available in each classroom for student and teacher use. Students may use these devices for computer skills development and practice; access to educational software supporting the Montessori method, Internet access, and word processing; and to project presentation preparation. The devices will also be used for project based learning to develop higher order thinking skills.

MWMA's library will also have computer stations available for the development of student research skills and keyboarding instruction. As the library is an ideal place for research, it is expected that students will have access to these computers to develop and hone research skills as well as other basic computer skills.

Teachers will have access to these devices and may use the devices for tracking student progress as well as creating an individualized curriculum for students, furthering the student-centered learning model that is pertinent to the mission of the school.

Mobile computers from classroom computer stations may be pooled and used for required computer based testing. When testing is complete, the mobile computers will be relocated back to their respective stations in the classroom. This will allow the computers to be used more frequently and efficiently than the typical mobile computer lab and will increase the frequency of exposure to a "hands-on" experience.

The use of a Wi-Fi network will provide the necessary connectivity to the Local Area Network and Internet. This network will allow teachers and staff to move freely throughout the classroom as well as other areas of the building for a seamless integration of technology. In addition teachers will have opportunities for continual observations, progress monitoring, individualized and integrated curriculum regardless of their location in the building.

Professional Development Strategy

The basis of adding any new or different piece of material to the Montessori environment must be to nurture the development of the child. Technology is no different. Just as extensive training is required for the correct use of the traditional Montessori materials; there is a need for careful guidance in the appropriate use of classroom technology. As with the Montessori materials, there is a learning curve for the suitable use of technology. Professional development courses and opportunities will assist the teachers in developing self-efficacy in the use of technology for tracking student progress.

Part of the work of the Montessori teacher is to evaluate didactic instruments to see how well the instruments support learning. MWMA's academic curriculum will be aligned to the Utah Core Curriculum and objectives. To assist the teachers' student progress evaluation and provide consistent monitoring of the curriculum scope and sequence MWMA may choose to utilize a system such as Montessori Records Xpress ("MRX"). This type of web-based student tracking

and records system is designed to align Montessori programs to state standards, to track student progress towards meeting state standards, to plan lessons and to produce progress reports. This web-based system can be available to teachers through the use of a tablet-type device in the classroom. A tablet-type or other mobile device will allow the teacher to move about the classroom to make and record observations for each student, take attendance, communicate with parents, document progress and generate individualized work plans that will further promote MWMA's mission to facilitate student centered learning.

Technology Assessment

MWMA is committed to implementing technology on an ongoing basis and understands that all technology needs will not be met in the first year. As the school matures there will be an ongoing commitment to proper implementation and use of technology in the Montessori academic setting. At the director's discretion, a committee may be formed to continually monitor and make recommendations for improvement and development of technology at MWMA. The committee will seek to match its recommendations to the goals, vision, and mission of MWMA. The committee will seek to make additional technology available for instruction and for students to have access to the Internet for research and school projects, software for remediation and acceleration, writing, and a variety of computer based programs that will enrich the integration of the core curriculum.

Acceptable Use

MWMA will ensure proper safeguards are in place to restrict access to inappropriate, unacceptable, and possibly illegal materials, while maintaining readily available and appropriate accessibility for students and staff. The use of both hardware and software filtering tools will maintain compliance with CIPA (Child Internet Protection Act) requirements and standards. As part of this compliance an Acceptable Use Policy will be adopted. To qualify for the electronic information resources provided by MWMA students and staff must be willing to abide by the rules set forth in the Acceptable Use Policy (See **Attachment G**).

MWMA's Governing Board will also adopt a Social Networking Policy (See **Attachment G**) that promotes proper online citizenship for students and gives guidelines for appropriate adult use and interaction. Both parents and teachers must be conscientious in teaching and modeling appropriate and responsible use of technology and social media.

Goals

Maria Montessori used extensive scientific observation to develop her theory of student learning. In support of her theory, she created beautiful hands-on materials that enhance learning through the senses. Technology offers us another tool and another method of discovery. Using Montessori's methods of observing student learning, we will be able to determine the place of

technology in the Montessori environment of MWMA. Intelligently integrated into the Montessori environment, technology can be a valuable communications tool and may promote traditional Montessori tenets.

Students will be expected to have digital age literacy, inventive thinking skills, effective communication skills, and high productivity skills. Efficient use of technology as well as basic Montessori practice can aid in achieving these skills.

Technology Goals	
Goal	Measurement
Budgetary	
Technology purchases will meet the following criteria: appropriate to the mission, within budget, training and installation costs included and outlined before purchase, and support increased student achievement.	100% of Technology purchases are within budget, a technology inventory is kept annually, 100% of student achievement (Section 9) and mission specific (Section 1) goals are met.
Professional Development	
Teachers will be trained to utilize the adopted Montessori student tracking and records system.	100% of teachers will input daily into the record system showing student skill levels on a variety of activities
Teachers will appropriately monitor and administer computer based testing.	100% of teachers will be trained on CBT administration and over 95% of all students will participate in CBT.
Technology Assessment	
The technology committee will assess the MWMA's technology inventory, use and future plans.	100% of committee's recommendations will be considered by the Board of Directors.
Mission Alignment	
Purchases and implementations regarding technology will be aligned with MWMA's mission.	The technology committee will review technology purchases to assure alignment with school's mission.
Student Skills	
Upper Elementary students (grades 4-6) will achieve individual goal in keyboarding proficiency appropriate.	95% of Upper Elementary students will meet annual individual keyboarding proficiency goal.
Jr. High School students (7-9) will have age and ability appropriate computer research skills.	100% of Jr. High School students will complete one computer based research project per year.

Assessment of telecommunication services, hardware, software, and other services (Yr 1)	Mobile Computer Lab	Classroom	Library	Admin. Office	Other Locations	Planned Future Acquisitions		
						Yr 2	Yr 3	Yr 4
Computers by type								
Mobile Computers	60	41		1		36		30
Wired Desktops			12	2	0	30		
Tablet Computers		21				4	30	30
A. < 4 yrs old	60	62	12	3	0	70	30	60
B. > 4 yrs old								
C.								
# of above computers that are Internet capable	60	62	12	3	0	70	30	60
Peripheral Devices								
A. Printers	2	8	2	1	1	10	1	1
B. Scanners	2	8	2	1	1	10	1	1
C. Assistive / adaptive devices		5					10	
D. TVs (digital signal)	0	0	2	0	0	1		
E. DVD Players			2		0	1	0	
F. LCD Projectors	2	3	1	0	0	3	6	10
G. Mimio-Interactive Whiteboard		5				3	6	0

Network Equipment								
A. Switches					6	2	0	0
B. Firewall					2	0	0	0
C. Servers					1	1	0	0
D. Wireless Access Points					8	2		
E. 8 Port Switch					1			
F. Battery Backup					4	1		
Total Classrooms	30							
Classrooms wired for internal connections	30							
Telecommunications Links								
A. Gigabit Ethernet	If Available							
B. Multiple T1s or T3s					1.5			
C. Cable/DSL					1			

Budget

MWMA has budgeted approximately \$130,000 for technology in the first year, which includes \$8,500 for Phone/Communications services including high-speed Internet. Internet will be at speeds capable of accommodating school-wide online end-of-level testing. The school has allocated \$15,000 for professional development to further develop and hone skills pertinent to the implementation of the technology within the Montessori classroom environment.

MWMA will continue to provide funding for both technology and professional development yearly in budgets. Should MWMA receive the Revolving Loan as well as Utah State charter school start-up monies (this is not reflected in the current budget) additional amounts may be allocated to support technology purchases and related professional development activities.

Community and business partnerships may also be pursued in an effort to keep technology current for MWMA’s students and faculty.

The school anticipates applying for Priority 1 E-Rate reimbursement by submitting proper forms to Universal Service Administrative Company for telecommunication and data services provided. Depending on the school’s demographics, the school may also apply for Priority 2 reimbursement to assist in the cost of eligible, reimbursable internal connections.

As stated above, MWMA has budgeted \$130,000 for technology in the planning year and in year one (\$65,000 planned to be spent each year). MWMA plans to use these funds as follows:

	Per Unit Cost	Planned Acquisitions			TOTAL	Planned Acquisitions		
		Amount Year 1	Amount Year 2	Amount Year 3		Cost Year 1	Cost Year 2	Cost Year 3
Computer Stations/ CTE Classroom/Mobile	\$ 665.00	80	0	30	110	\$ 53,200.00	\$ -	\$ 19,950.00
Teacher Computer	\$ 700.00	21	2	0	23	\$ 14,700.00	\$ 1,400.00	\$ -
Tablets for Student Use	\$ 300.00	0	30	0	30	\$ -	\$ 9,000.00	\$ -
Tablets - Teacher/Admin use	\$ 400.00	21	4	0	25	\$ 8,400.00	\$ 1,600.00	\$ -
Library Computers	\$ 665.00	12	0	0	12	\$ 7,980.00	\$ -	\$ -
Admin. Office	\$ 700.00	3	0	0	3	\$ 2,100.00	\$ -	\$ -
Other locations		0	0	0	0	\$ -	\$ -	\$ -
						\$ 86,380.00	\$ 12,000.00	\$ 19,950.00

Peripheral Devices

- Printers
- Assistive / Audio Enhancement
- Digital TV's
- DVD / Blue Ray Players
- LCD Projectors
- Mimio (Smartboard)
- Copy Machine / Printer / Scanner (Lower Capacity)
- Copy Machine / Printer / Scanner (High Capacity) (Leased)

Planned Acquisitions				
Amount Year 1				
Computer Station	Classroom Use	Library	Admin Office	Other
Printers	10	0	2	0
Assistive / Audio Enhancement	0	3	0	0
Digital TV's	0	0	2	0
DVD / Blue Ray Players	0	0	2	0
LCD Projectors	0	5	1	0
Mimio (Smartboard)	0	5	0	0
Copy Machine / Printer / Scanner (Lower Capacity)	0	0	0	1
Copy Machine / Printer / Scanner (High Capacity) (Leased)	0	0	0	0.25



Peripheral Devices

Printers
 Assistive / Audio Enhancement
 Digital TV's
 DVD / Blue Ray Players
 LCD Projectors
 Mimio (Smartboard)
 Copy Machine / Printer / Scanner (Lower Capacity)
 Copy Machine / Printer / Scanner (High Capacity)
 (Leased)

Planned Acquisitions				
Amount Year 2				
Computer Stations	Classroom Use	Library	Admin Office	Other
10	0	0	0	0
0	0	0	0	0
0	0	1	0	0
0	0	0	0	0
0	3	0	0	0
0	3	0	0	0
0	0	0	0	0
0	0	0	0	0.25

Peripheral Devices

Printers
 Assistive / Audio Enhancement
 Digital TV's
 DVD / Blue Ray Players
 LCD Projectors
 Mimio (Smartboard)
 Copy Machine / Printer / Scanner (Lower Capacity)
 Copy Machine / Printer / Scanner (High Capacity)
 (Leased)

Planned Acquisitions				
Amount Year 3				
Computer Stations	Classroom Use	Library	Admin Office	Other
10	0	0	0	0
0	10	0	0	0
0	0	0	0	0
0	0	0	0	0
0	6	0	0	0
0	6	0	0	0
0	0	0	0	0
0	0	0	0	0.25

		Planned Acquisitions				
Per Unit Cost		Amount Year 1				
		Computer Station	Classroom Use	Library	Admin Office	Other
Peripheral Devices						
Printers	\$ 120.00	\$ 1,200.00	\$ -	\$ 240.00	\$ -	\$ -
Assistive / Audio Enhancement	\$ 1,425.00	\$ -	\$ 4,275.00	\$ -	\$ -	\$ -
Digital TV's	\$ 300.00	\$ -	\$ -	\$ 600.00	\$ -	\$ -
DVD / Blue Ray Players	\$ 130.00	\$ -	\$ -	\$ 260.00	\$ -	\$ -
LCD Projectors	\$ 675.00	\$ -	\$ 3,375.00	\$ 675.00	\$ -	\$ -
Mimio (Smartboard)	\$ 800.00	\$ -	\$ 4,000.00	\$ -	\$ -	\$ -
Copy Machine / Printer / Scanner (Lower Capacity)	\$ 1,100.00	\$ -	\$ -	\$ -	\$ 1,100.00	\$ -
Copy Machine / Printer / Scanner (High Capacity) (Leased)	\$ 13,000.00	\$ -	\$ -	\$ -	\$ -	\$ 3,250.00
		\$ 1,200.00	\$ 11,650.00	\$ 1,775.00	\$ 1,100.00	\$ 3,250.00
		\$ 14,625.00				

***Not included in this budget total - extra line item exists in the budget*

		Planned Acquisitions				
Per Unit Cost		Amount Year 2				
		Computer Station	Classroom Use	Library	Admin Office	Other
Peripheral Devices						
Printers	\$ 120.00	\$ 1,200.00	\$ -	\$ -	\$ -	\$ -
Assistive / Audio Enhancement	\$ 1,425.00	\$ -	\$ -	\$ -	\$ -	\$ -
Digital TV's	\$ 300.00	\$ -	\$ -	\$ 300.00	\$ -	\$ -
DVD / Blue Ray Players	\$ 130.00	\$ -	\$ -	\$ -	\$ -	\$ -
LCD Projectors	\$ 675.00	\$ -	\$ 2,025.00	\$ -	\$ -	\$ -
Mimio (Smartboard)	\$ 800.00	\$ -	\$ 2,400.00	\$ -	\$ -	\$ -
Copy Machine / Printer / Scanner (Lower Capacity)	\$ 1,100.00	\$ -	\$ -	\$ -	\$ -	\$ -
Copy Machine / Printer / Scanner (High Capacity) (Leased)	\$ 13,000.00	\$ -	\$ -	\$ -	\$ -	\$ 3,250.00
		\$ 1,200.00	\$ 4,425.00	\$ 300.00	\$ -	\$ 3,250.00
		\$ 5,925.00				

***Not included in this budget total - extra line item*

	Planned Acquisitions					
	Per Unit Cost	Amount Year 3				
		Computer Station	Classroom Use	Library	Admin Office	Other
Peripheral Devices						
Printers	\$ 120.00	\$ 1,200.00	\$ -	\$ -	\$ -	
Assistive / Audio Enhancement	\$ 1,425.00	\$ -	\$ 14,250.00	\$ -	\$ -	
Digital TV's	\$ 300.00	\$ -	\$ -	\$ -	\$ -	
DVD / Blue Ray Players	\$ 130.00	\$ -	\$ -	\$ -	\$ -	
LCD Projectors	\$ 675.00	\$ -	\$ 4,050.00	\$ -	\$ -	
Mimio (Smartboard)	\$ 800.00	\$ -	\$ 4,800.00	\$ -	\$ -	
Copy Machine / Printer / Scanner (Lower Capacity)	\$ 1,100.00	\$ -	\$ -	\$ -	\$ -	
Copy Machine / Printer / Scanner (High Capacity) (Leased)	\$ 13,000.00	\$ -	\$ -	\$ -	\$ 3,250.00	
		\$ 1,200.00	\$ 23,100.00	\$ -	\$ 3,250.00	
		\$			24,300.00	

***Not included in this budget total - extra line item*

Network Equipment	Per Unit Cost	Planned Acquisitions			TOTAL	Planned Acquisitions		
		Amount Year 1	Amount Year 2	Amount Year 3		Cost Year 1	Cost Year 2	Cost Year 3
Servers	\$ 7,500.00	1	1	0	2	\$ 7,500.00	\$ 7,500.00	\$ -
Firewall	\$ 650.00	2	0	0	2	\$ 1,300.00	\$ -	\$ -
Switches	\$ 100.00	6	2	0	8	\$ 600.00	\$ 200.00	\$ -
Wireless Access Points	\$ 150.00	8	2	0	10	\$ 1,200.00	\$ 300.00	\$ -
8 Port Switch	\$ 130.00	1	0	0	1	\$ 130.00	\$ -	\$ -
						\$ 10,730.00	\$ 8,000.00	\$ -

Software & Miscellaneous	Cost Per Unit	Planned Acquisitions			TOTAL	Planned Acquisitions		
		Year 1	Year 2	Year 3		Cost Year 1	Cost Year 2	Cost Year 3
Software	\$ 60.00	116	2	30	148	\$ 6,960.00	\$ 120.00	\$ 1,800.00
Server Software	\$ 2,000.00	1	1		2	\$ 2,000.00	\$ 2,000.00	\$ -
Montessori web based student tracking licence.	\$ 200.00	23	25	25	73	\$ 4,600.00	\$ 5,000.00	\$ 5,000.00
Server installation and set up	\$ 10,000.00	1	1	0	2	\$ 10,000.00	\$ 10,000.00	\$ -
						\$ 17,025.00	\$ 26,275.00	\$ 19,300.00

Telecommunications Budget

Telecommunication Links	Cost Per Month	Planned Acquisitions			TOTAL	Planned Acquisitions		
		Year 1	Year 2	Year 3		Cost Year 1	Cost Year 2	Cost Year 3
Multiple T1's and Phone Lines	\$ 400.00	1.5	0	0	1.5	\$ 7,200.00	\$ 7,200.00	\$ 7,200.00
Cable Broadband	\$ 100.00	1	0	0	1	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
						\$ 8,400.00	\$ 8,400.00	\$ 8,400.00
						\$	25,200.00	

Proposed technology-related policies, including Acceptable Use Policies for students and for employees and Social Networking Policies, are included as **Attachment G**.

Educational Service Provider

Mountain West Montessori Academy (MWMA) intends to contract with an established, reputable, and successful educational service provider (“ESP”) beginning in the school’s first year. The primary objective in contracting with an ESP is to help ensure a level of professionalism in the management of the school and to allow the Director and administrative team to focus on accomplishing the mission and vision of the school. The duties of the ESP, which are explained in more detail below, may include some or all of the following:

- Assist the Governing Board of Directors in establishing policies and procedures
- Assist in developing and implementing accounting policies and procedures
- Bookkeeping, accounts payable/receivable
- Budget preparation and reporting
- Ensuring the school maintains appropriate liability insurance
- Coordinating facility management, operation and maintenance
- Assisting the Director with recruiting and other Human Resources items
- Janitorial service contracting (if needed)
- Legal issue research and resolution
- Assisting with the development of policies and procedures to ensure compliance with applicable laws and regulations
- Assist in the maintenance of board financial records and in the coordination of annual audits with an independent auditor selected by the Governing Board of Directors
- State grant writing
- Assisting with Board training for effective leadership
- Special programs consulting
- Financial reporting to State
- Assist in Board record keeping and Open Meetings Act compliance

The Governing Board of Directors intends to start the first academic year with an ESP that understands Utah public education and charter school law, accounting and bookkeeping, compliance, and fiscal management, and that will support MWMA’s mission and educational philosophy. The Governing Board of Directors recognizes that it is the ultimate policy-making

organization and retains absolute control in the selection or removal of both service organizations serving the school, including any ESP, and the Director.

In order to identify the ESP that will best meet the school's needs, the Governing Board of Directors will advertise a Request for Proposal and will follow all applicable laws and regulations of the Utah Procurement Code in selecting an ESP.

The Governing Board of Directors intends to follow the guidance from the State Charter School Board regarding schools' relationships with ESPs. Accordingly, the school will abide by the following principles in its relationship with any ESP:

- Board Members, school employees, and their respective spouses or immediate family members will not have conflicts of interest with any ESP that contracts with the school, such as direct or indirect ownership, employment, contractual or management interest, etc.
- In order to ensure that the Governing Board of Directors is fully informed regarding the business and legal implications of its agreement, the Governing Board of Directors will obtain independent legal counsel to review, negotiate and advise the Governing Board of Directors regarding the school's agreement with any ESP. Such legal counsel for the school will not represent the ESP or its principals. The ESP agreement will thus be an arms-length, negotiated agreement between an informed Governing Board of Directors and the ESP. The Governing Board of Directors will review ESP agreements at least once every five years. ESP agreements will have a term of no more than five years.
- No agreement with an ESP will purport to amend or change the school's charter or contain any provisions inconsistent with the school's charter.
- In negotiating the financial terms of the ESP agreement, the Governing Board of Directors will ensure that it budgets adequate resources to fulfill its Charter requirements.
- Marketing and development costs paid by or charged to the school specific to the school program will not include any costs for the marketing and development of the ESP.
- The school's agreement with an ESP will contain insurance and indemnification provisions outlining the coverage the ESP will obtain. The ESP's insurance will be separate from and in addition to the insurance the Governing Board of Directors will obtain.
- The school's ESP agreement will provide that the original financial, educational, and student records pertaining to the school are school property and that such records are subject to the provisions of the Government Records Access and Management Act and the Federal Family Educational Rights and Privacy Act.
- No provision of the school's ESP agreement will interfere with the Board's duty to exercise its statutory, contractual, and fiduciary responsibilities governing the operation of the school. No provision of the school's ESP agreement will prohibit the Governing Board of Directors from acting as an independent, self-governing public body or allow public decisions to be made other than in compliance with Utah's Open & Public Meetings Act.

- The school’s ESP agreement will provide that all finance and other records of the ESP related to the school will be made available to the school’s independent auditor and authorizer. The agreement will not permit the ESP to select and retain an independent auditor for the school.
- If an ESP purchases equipment, materials, and supplies on behalf of or as the agent of the school, the school’s ESP agreement will provide that such equipment, materials, and supplies are to remain the property of the school. The ESP agreement will contain a provision that if the ESP procures equipment, materials, supplies, contractors, etc. on the school’s behalf it will comply with the Utah Procurement Code, (UCA 63G-6).
- The school’s ESP agreement will provide that the school owns all proprietary rights to curriculum or educational materials that (i) are both directly developed and paid for by the school; or (ii) were developed by the ESP at the direction of the Governing Board of Directors with school funds dedicated for the specific purpose of developing such curriculum or materials.
- If the school’s ESP agreement involves the placement of ESP employees in the school, the agreement will clarify which individuals or positions are employees of the ESP, and which persons or positions are employees of the school. If the ESP leases employees to the school, the ESP agreement will provide that the leasing company accepts full liability for benefits, salaries, worker’s compensation, unemployment compensation and liability insurance for its employees leased to the school or working on school operations. If the school is staffed through an employee leasing agreement, legal confirmation should be provided to the Governing Board of Directors that the employment structure qualifies as employee leasing.
- If the school enters into a lease, executes promissory notes or other negotiable instruments, or enters into a lease-purchase agreement or other financing relationships with the ESP, then such agreements will be separately documented and not be a part of or incorporated into the ESP agreement.
- The school’s ESP agreement will contain at least one of the following methods for paying fees or expenses: (i) the Governing Board of Directors may either pay or reimburse the ESP for approved fees or expenses upon properly presented documentation and approval by the Board; or (ii) the Board may advance funds to the ESP for the fees or expenses associated with the school's operation provided that documentation for the fees and expenses are provided for Board ratification.

ESP Services and Responsibilities

The ESP will be responsible and accountable to the Governing Board of Directors for specified administrative and operational activities of the school in accordance with the Charter and as enumerated in the school’s agreement with the ESP. The Governing Board of Directors will retain full responsibility for decision making, including policymaking, employment decisions, and financial decisions.

The ESP selected by the Governing Board of Directors should have a proven track record for providing services to Utah-based charter schools. The information that the ESP provides to the Governing Board of Directors in its proposal should include audit performances of client schools, proof of qualified staff support, and client references. The ESP should demonstrate experience in supporting a charter school throughout the planning and implementation stages as well as the operational stage.

The selected ESP must demonstrate that its menu of services relieves the school from key administrative and compliance burdens that it would otherwise bear internally, thus allowing the school's administration to focus on student and school success. The ESP must provide a schedule of fees so that the Governing Board of Directors can perform an independent cost-benefit analysis.

In order to perform the necessary analysis and make its decision, the Governing Board of Directors would like to consider each prospective ESP's ability to provide services including the following:

Start-up Activities. Coordinate remaining start-up activities. These activities may include, but not be limited to, Application for Recognition of Exemption Under Section 501(c)(3) and Utah Registration for Exemption from Corporate Franchise or Income Tax. The ESP may also assist the Governing Board of Directors to establish the timelines of miscellaneous activities pertaining to school implementation and operation.

Records Management. Work in conjunction with the Board Secretary to coordinate meetings, prepare and post agendas, attend meetings of the Governing Board of Directors and maintain the minutes and records of those meetings and comply with the requirements of the Open Meetings Act regarding such meetings and record keeping. The ESP will maintain a copy of the MWMA records and assist the Board Secretary in maintaining a copy at a location designated by the Governing Board of Directors, ensuring compliance with state and federal requirements for record keeping, including maintaining confidentiality.

Financial. Provide bookkeeping services and coordinate with proven and reputable accounting firms to ensure the accuracy and timeliness of financial reporting and record keeping as required by the Authorizer and state law. The ESP will also provide accounting information to the Governing Board of Directors and the school's Director on a regular basis as requested.

Under the direction of the Governing Board of Directors, and with the input of the Director, the ESP will prepare annual budgets and financial forecasts to present to the Board for review and approval at its annual Board budget meeting. As appropriate, the ESP may assist in amending the budget from time to time as deemed necessary by the Governing Board of Directors. The ESP will assist the school in soliciting certain grants available for the funding from the various governments, private and institutional sources as well as coordinating financing from private and

public sources for loans desired by the Governing Board of Directors. In addition, the ESP will assist in coordinating the solicitation of any State, Federal, or local government funds earmarked for school facilities development, improvement, or acquisition as well as other sources of funding that may become available to charter schools from time to time.

Human Resources. Prepare employment agreements for new school employees; coordinate with and assist the Director in the identification and recruitment of qualified teachers, paraprofessionals, administrators, and other staff members and education professionals; and advise the Governing Board of Directors and the Director regarding compliance with employment laws and regulations.

Assistance to Administration. Assist the Director to identify and or develop curricula in connection with the operations of the school and for the procurement of proven student assessment methodologies and coordinate professionals to administer and evaluate results. Proposals from professionals offering to provide assessment and student evaluation services will be provided to the Board for approval. The Governing Board of Directors and the ESP will cooperate in good faith to identify measures of, and goals for, school and student performance, including but not limited to parent satisfaction.

At the request of the Governing Board of Directors, the ESP may act as an additional liaison with State Charter School Board officials on behalf of the school. In connection therewith, representatives from the ESP may attend meetings and public hearings and report to the Governing Board of Directors or Director any items of relevance to the school.

Selection of ESP

After consulting with other charter schools in Utah, MWMA has set a budget of a maximum of approximately \$400.00/student per year to cover the costs associated with hiring an ESP. The Governing Board of Directors will create a scoring rubric for the selection of the ESP. Similar to the scoring rubric of the charter application, the Governing Board of Director's rubric for selection of an ESP will assign a numerical score to the quality of each proposal's response pertaining to various services. The successful proposal will demonstrate an understanding of the key service items and provide a narrative of how the service items will be accomplished. The successful proposal will also provide the necessary services at a cost-effective rate. Recognizing that both the scope of services offered as well as the corresponding pricing structures differ among different ESP models, the school will weigh the scope of services offered by the responsive ESPs and their relative costs in order to determine which responsive ESP will best meet the school's needs.

The Governing Board of Directors will follow all applicable federal and state procurement laws and regulations in connection with selecting and hiring an ESP.

Extra-Curricular Activities

Extra-Curricular Activity Opportunities

Mountain West Montessori Academy (MWMA) intends to provide a number of extra-curricular opportunities for its students in order to enhance students' educational experience and provide them with additional opportunities for social interaction, skill development, leadership, exploration of interests, and physical exercise. Although MWMA strives to provide a well rounded, robust educational experience in the classroom, we believe that it is also extremely important to give students a chance to grow and develop outside of the classroom setting. Participation in such activities can provide students with a more fulfilling experience at school and help students be even more successful in class.

The Director will decide which extra-curricular activities will be offered at the school. Activities will be selected based on the activity's alignment with MWMA's mission as well as safety and feasibility concerns, along with other criteria established by the Director. Student interest will likely be a primary consideration as well. We anticipate that parent volunteers will play a key role in supervising, instructing, and coordinating the school's extra-curricular activities.

The school may offer activities such as leadership and community service, arts and crafts activities, choir, musical instruments, sports and other physical activities, science, yearbook, school newspaper, technology, debate, theater, and tutoring.

MWMA may charge reasonable fees in order to cover the cost of extra-curricular activities. However, in accordance with state law and State Board of Education rules, MWMA will not charge fees for anything that takes place during the regular school day for students in grades K-6. This means that if a child is in grades K-6, that child cannot be charged for textbooks, classroom equipment or supplies, musical instruments, field trips, assemblies, snacks (other than food provided through the School Lunch Program), or for anything else that takes place or is used during the regular school day, but such fees may be charged for students in grades 7-9. Fees may only be charged for programs offered before or after school, or during school vacations for grades K-6. Fee waivers will be offered to students who qualify in accordance with Utah law.

A proposed Extra-Curricular Activities Policy and a proposed Fee Schedule are included as **Attachment H**.

Special Education

Mountain West Montessori Academy (MWMA) is committed to providing a Free Appropriate Public Education (FAPE) for all students in the Least Restrictive Environment (LRE) regardless of their disability and severity. The vision of MWMA is to bring the benefits of a Montessori education to a wide group of students, whatever their academic abilities, producing graduates who possess the confidence, clarity, and compassion to improve our world.

Services and Placement

The Montessori Method has its earliest roots in special education and stresses the importance of responding to each student as an individual. Teachers and administrators at MWMA will facilitate and create learning experiences that are carefully matched to students' individual needs, interests, and developmental levels. This individualized, hands-on learning experience makes MWMA uniquely equipped to meet the needs of all students, including students with disabilities.

The individualized curriculum developed and implemented in Montessori classrooms is compatible with the individualization required for students with disabilities. Each student is able to move through the material sequence at his or her own pace. While some lessons are presented in small groups, the philosophy stresses individualized demonstrations of each lesson. This is conducive to a highly individualized education program that facilitates the successful inclusion of students with disabilities into their same-aged classroom setting.

The Montessori philosophy is that *every* student has an individualized plan of education and that all students are included in every facet possible of the Montessori education program. Admittedly, some students may need additional assistance either in the classroom or in a separate room; however, a Montessori school strives to keep the separation of students with special needs to a minimum regardless of severity of disability.

MWMA is committed to educating students with disabilities in LRE as deemed appropriate by the students' Individualized Education (IEP) Team. In order to determine this, IEP Teams will look at all possibilities from least restrictive to most restrictive and will choose what is appropriate for each individual student based on their needs. There are many options in between the least and most restrictive placements that need to be considered. MWMA will offer the full range of alternative placements in the event that a student might need a more restrictive placement. The order of the continuum of Alternative Placements offered at MWMA will be as follows (§300.115):

- Regular Classes,

- Special Classes,
- Special Schools,
- Home Instruction,
- Instruction in Hospitals and Institutions; and

Provisions for supplementary services (e.g., resource or speech services) will be provided in conjunction with general education classroom placement. Even when the IEP Team determines a more restrictive placement for a student with a disability is most appropriate, the student will participate with their non-disabled peers to the maximum extent that is appropriate such as meals, recess periods, athletics, transportation, recreational activities, and special interest groups or clubs.

Qualified Staff

MWMA’s Board of Directors will hire a Director who has knowledge of special education and who will agree to attend, at a minimum, the state required special education in-service class outlined in the USOE rules and regulations. The expectation is that the Director at MWMA will be responsible for the school’s implementation of special education services adhering to the IDEA and Utah Special Education State Board of Education Rules (USBE SER) and Guidelines. When hiring special education staff, the Director will follow the USBE SER for hiring highly qualified teachers along with the state’s public charter school law.

Special education teachers hired at MWMA to provide services to students with disabilities will hold a Utah Professional Educator License or Endorsement in the area in which they provide services. This includes special education teachers, speech/language pathologists, school psychologists, school social workers, and other professionals. Physical and occupational therapists must have the appropriate licensing/credentials for services rendered. The Director at MWMA will be responsible for the evaluation of the appropriateness of licenses and endorsements when assigning staff members. The Director at MWMA will ensure that all personnel necessary to carry out Part B of the IDEA are appropriately and adequately prepared, subject to the requirements related to personnel qualifications. Trainings provided by USOE and the Utah Personnel Development Center (UPDC) will be accessed as well as various other professional development opportunities. State meetings, specifically related to Special Education (e.g. USEAM), will be attended by MWMA’s Special Education Teacher Leader or a representative appointed by the Director.

MWMA’s Director will oversee the caseload of each special educator and related service provider to ensure that a FAPE is available to all eligible students with disabilities. These caseloads will be determined using the USOE Caseload Guidelines as the basis taking into consideration the number of students, the hours of service required per student, the pupil/teacher

ratio during instruction, and the number of students with severe disabilities. Based on projected enrollment numbers, at least 1.5 highly qualified special education teachers will be on staff at all times and additional highly qualified special education staff will be added based on MWMA's special education needs. Other related service professionals such as speech therapists and occupational therapists that are needed to conduct evaluations and/or provide services will be contracted out according to need. MWMA's Director will network with other charter schools to increase the schools ability in efficiently providing appropriate related service professionals.

MWMA will be responsible and accountable for the use of funds provided for the education of students with disabilities from State and Federal sources. Administrators and/or the Educational Service Provider (ESP) at MWMA will receive training regarding allowable uses of restricted State and Federal (IDEA) special education funds (EDGAR, OMB A-133, and USBE-SER IX and X) and ensure that adequate documentation is maintained to support the use of those restricted funds. As part of their Utah Consolidated Application (UCA), MWMA will submit a plan to the USOE in which they will provide assurances that they meet each of the conditions in USB-SER IX (e.g., coordination with the National Instructional Materials Access Center (NIMAC), funds used for allowable direct costs only) for the expenditure of the IDEA funds on a yearly basis. Costs in this plan will be allowable, allocable, and appropriate according to federal regulations for the use of restricted (categorical) monies.

Policies

MWMA will follow all the requirements of the Individuals with Disabilities Act (IDEA) 2004 and Utah Special Education Rule when developing their Special Education Policies and Procedures Manual that will be submitted to the USOE prior to November 1 of their opening year. The goal of this Manual will be to ensure students with disabilities or suspected disabilities will be identified, evaluated, and provided appropriate educational services and/or accommodations within the definitions of IDEA 2004, ADA, and Section 504. Within the timeline requirements of the IDEA, MWMA's Special Education Department will be outlined in this Manual. Specifically, the following areas will be addressed:

1. General Provisions (Program Description);
2. Identification, Location, and Evaluation of Students (Child Find, Referral, Evaluation, Re-Evaluation, Eligibility Determination including SLD Classification, and Eligibility Classifications);
3. IEP Development and Service Delivery (IEP Team Participants, IEP Development and Content, LRE, Initial Placement, IEP Changes, Transition Services, and LRBI);

4. Procedural Safeguards for Students and Their Parents (Parental Participation, Independent Education Evaluation (IEE), Written Prior Notices, Dispute Resolution, Surrogate Parents, Confidentiality, and Discipline);
5. LEA Eligibility and Responsibilities (Assessment and Reporting, Public Posting, Ensuring Services, Supervision, Personnel Standards, Early Intervening Services, and Caseloads); and
6. Students with Disabilities in Other Settings (Private and Public School Placements).

This Manual will be used in coordination with the Utah State Board of Education Rules (August 2007) incorporating USOE's Special Education Guidelines (August 2008) for Specific Learning Disabilities (SLD), Least Restrictive Behavioral Interventions (LRBI), and Caseloads as set forth.

Once MWMA's Special Education Policies and Procedures Manual is approved by the USOE and the local Board of Directors, it is important that all personnel follow the procedures therein. Teachers, paraprofessionals, and administrators will be expected to familiarize themselves with what the school has committed to implement through attendance at in-house trainings developed by the MWMA Special Education Department and approved by the school's Director.

Child Find

Consistent with the requirements of Part B of the IDEA and with the USB-SER II.A, MWMA will develop policies and procedures outlined in their Special Education Policies and Procedures Manual (see above) to ensure that all students with disabilities grades K-9, residing within the jurisdiction of MWMA, regardless of the severity of their disability, and who are in need of special education and related services, are identified, located, and evaluated. MWMA's Child Find system will include the following major components:

- Prior to or at the beginning of each school year, training for teachers and staff on Child Find obligations and strategies to facilitate the identification of students that are in need of additional supports and/or services will be conducted as well as reviewed throughout the school year.
- Yearly training for all teachers will be given on MTSS/RtI referral process for special education. A review of this in-service will be given around mid-year and more often if deemed necessary by the IEP Team and/or school Director.
- Participation in the statewide data collection system for reporting student information, including federal child count.

- USOE on-site monitoring of Child Find procedures through the regularly scheduled UPIPS monitoring process.
- MWMA will have regularly occurring problem-solving meetings (e.g., weekly) consisting of special and general education teachers where students of concern are discussed. These discussions will include student’s teacher input, current formal and informal testing data, work samples, and identification of interventions attempted and accompanying data.
- As students are enrolled in MWMA their cumulative files will be reviewed in regards to the student’s academic history, attendance, and Criterion Referenced Test scores.
- All students entering MWMA will be pre-screened in Reading and Math. These data will be used as a guide for instructional decision-making in the area set forth.
- All students entering Kindergarten, or when requested by the parent or teacher of non-Kindergarten students, will receive vision screening. Hearing screenings will be administered at the request of the parent or teacher.

Evaluations

If school personnel and/or the parent determine that general education teaching approaches have been unable to provide educational benefit then school personnel at MWMA will work with the student using specific, tiered, interventions (MTSS). If after a reasonable period of time, allowing for on-going informal evaluation, monitoring, and documentation of the interventions, the interventions have proven ineffective, and the student continues to struggle, school personnel and/or the parent may determine a referral for special education evaluation is necessary. If there is reason to suspect the student is eligible for special education and related services due to a disability, the student shall be referred to special education for an initial evaluation based on educational concerns after parental permission is given to initiate the evaluation.

Evaluation procedures/assessments selected and administered will not be discriminatory on a racial or cultural basis. MWMA plans to utilize a variety of assessment tools and strategies will be used to gather relevant, functional, and developmental information about the student, including parental input. The following outlines MWMA’s process for an initial evaluation:

- MWMA shall ensure a full and individual initial evaluation is conducted for each student being considered for special education services to determine if the student is a “student with a disability” under Part B of the IDEA and USOE’s Special Education Rules USBE-SER X.F, and to determine the educational needs of the student. The results of the evaluation shall be used by the student’s IEP Team in meeting the IEP requirements outlined in the USOE’s Special Education Rules. Parental requests for evaluation shall be submitted to the special education team for review and recommendation. In the case of a parental referral, every

effort will be made to implement the general education RtI process as the student is being evaluated for Special Education and related services.

- MWMA will have written procedures for making a referral for an individual, initial evaluation and the actions to be taken on the referral. Procedures will include implementation of effective instructional procedures, which then are monitored for student response to intervention. If the student does not respond to multiple interventions over a reasonable period of time, the parent/school team will decide whether the student is then referred for special education. If referred, the LEA at MWMA will make the formal request and parents are required to give permission for evaluation prior to any formalized testing.
- Prior written notice will be provided and parental consent for testing will be documented before a student is evaluated. Once MWMA receives signed parental consent, the evaluation process will be completed within forty-five (45) school days.
- Procedural Safeguards for students with disabilities and their parents will be established, maintained, and implemented. These safeguards include the opportunity for parental participation in meetings with respect to the identification, evaluation, educational placement of the student, and the provision of FAPE to the student. Parents of students with disabilities will receive a hardcopy of the Procedural Safeguards once a year, usually at the annual IEP review. However, a copy must also be given to the parents upon initial referral or parental request for evaluation, receipt of the first State or due process complaint in that school year, and whenever requested by the parents. A special educator will provide parents with a brief explanation of the main provisions of the Procedural Safeguards.
- Students referred from within the school and being evaluated for the first time may not be placed in special education and/or receive special education and related services prior to the completion of the determination of eligibility for special education and related services, the completion of the IEP process, and parental permission for placement in Special Education.

Eligibility

Upon the completion of the assessments/procedures, a group of qualified professionals and the parent of the student must determine whether the student is a “student with a disability” as defined in Part B of the IDEA and USBE-SER. The student can be determined eligible in thirteen different categories as directed by the categorical criteria and tests. Once determined eligible for special education and related services due to a disability, the IEP Team will develop an IEP and determine the appropriate educational placement in the LRE to the maximum extent appropriate where the student’s FAPE can be provided. MWMA will offer a range of placement options adhering to IDEA requirements, including placement in the general education setting with or without resource and/or itinerant services; placement in a special class; a special school; a residential setting, and homebound or hospitalized/institutional placement. IEPs will be reviewed on an annual basis and re-evaluation for special education and related services will

occur every three years or more often if deemed necessary by the IEP Team.

Special Education Records

All students will be enrolled at MWMA based solely on the lottery and other requirements under the Utah Code and the USBE Administrative Rules for Charter Schools, and without restrictions due to race, color, gender, national origin, disability status, or religion. In the admission application and during the registration process, parents are asked to identify students who have previously been receiving Special Education, 504, or ELL services in their neighborhood schools. This identification will allow school personnel to request the student's file, following all the procedures detailed on the In-State and Out-of-State Transfer Student Checklist provided by USOE, which will facilitate the identification of appropriate educational services when school begins. Efforts to obtain such records in a timely way will include, but will not be limited to, phone calls to the sending school or district, mailed or faxed requests for records, or even a visit to the local school holding the records. In the State of Utah, a parentally signed release of records is not required for one LEA to send a special education file to another LEA.

In compliance with the IDEA, services comparable to those described in the previously held IEP will be provided until such time MWMA either adopts the previously held IEP or develops and implements a new IEP that is consistent with Federal regulations and USBE-SER. For those students from out-of-state, comparable services will be provided until eligibility is determined and, if the student is eligible, the IEP Team at MWMA will meet to develop a new IEP.

Since student records will be received from a variety of LEAs, each with their own method of file organization, MWMA will establish its own file organizational method and re-organize files into the local format as they are received. This will enable the special education staff (1) to analyze each file to determine compliance, optimality utilizing the Minimum Contents Checklist Form kept in each file, (2) to extract data on due dates, (3) to identify current goals and services, and (4) to stay current with all required procedures. Information gathered will be summarized by a listing of all students with current IEPs with the dates of referral, eligibility determination, IEP development, goals, type and amount of services, and program modifications, accommodations, and supports. This is a functional mechanism for tracking each student's program and assigning special education personnel and will provide a convenient way to produce a summary of the student's IEP to the general education classroom teacher(s) at MWMA.

During the start-up phase, the Special Education Department at MWMA will also identify which Special Education Forms they intend to use to document the required components of the IDEA. Either the State forms or the forms from an IEP company (e.g., IEP Pro) will be chosen and gradually incorporated into each file as due dates for review of IEP or reevaluation for determination of continuing eligibility occur and for all new referrals.

MWMA will protect the confidentiality of personally identifiable information at the level required under the IDEA and the Family Education Rights and Privacy Act (FERPA). This includes keeping all Special Education files in a locked cabinet while maintaining a list of the names and positions of educational staff that may have access to these files on an Access Authorization Form posted on the front of the locked cabinet. These include those persons with a legitimate need to know, such as MWMA's Director, the Special Education Teacher(s), and related service providers. It will be the responsibility of MWMA's 504 Coordinator (as identified by MWMA's Director) and the Special Education Teacher Leader to ensure that those who "need to know" are informed of student needs and classroom accommodations.

Persons listed on the Access Authorization Form do not need to sign the Record of Access Form located at the beginning of each student's file; any other persons or agencies assessing the students' records are required to log their name, position, and agency on the Access Form located in each student's file. On request, MWMA will provide parents with a list of the types and locations of education records collected, maintained, or used.

Section 18
Additional Information

Letter of Support – Councilman Steve Barnes

Utah State Office of Education
P.O.Box 144200
Salt Lake City, Utah 84114-4200

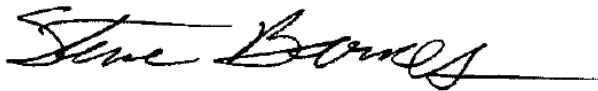
RE: Letter of Support – New Charter School

Dear Charter School Board Members

As a member of the South Jordan City Council, I am proud to be on the board of Mountain West Montessori Academy. Our public schools are filled to capacity and have been forced to utilize pods in order to create more classroom space. The addition of this new Charter School will provide much needed classroom space for the youth in our community.

I believe that this Charter School will be a great addition to the educational system in South Jordan. Please consider the charter for Mountain West Montessori Academy in South Jordan.

Sincerely,



Steve Barnes
South Jordan City Council Member (District 4)

Appendix A

Charter School Lottery Policy

Proposed Enrollment and Lottery Policy

Purpose

To provide guidelines on appropriate procedures on enrollment and lottery processes.

Policy

In regards to applications, enrollment, and lottery procedures, Mountain West Montessori Academy (the “School”) will follow all state and federal laws and guidelines.

Notice of the opportunity to submit an application and procedures for enrollment at the School will be published on the School’s website beginning no later than sixty (60) days before the School’s initial open enrollment period. The School’s website will also provide the following enrollment information: (i) a description of the procedures for applying for admission to the School; (ii) the opening date or the School’s calendar; and (iii) a description of how a student may transfer from the School to another charter school or district school.

For each enrollment period, if there are more applications for admission in any grade than there are available openings in that grade, the School will conduct a lottery to determine which students will be admitted to the School. The School will conduct its lottery electronically and notify accepted students via e-mail or via telephone.

The following students will receive preference in the School’s lottery in the following order: children of “founders”; children of full time School employees (individuals employed by the School who work more than twenty hours per week for the School; children of independent contractors are not eligible for preference); siblings of children enrolled in the School. Such students will not, however, be given priority notice or guaranteed admission to the School. No more than 5% of the total student population will be enrolled as a result of priority based on founder or employment status of the student’s parent(s).

Individuals who play a significant role in the development of the school will be eligible to receive “Founder” status. The School’s Governing Board of Directors will approve each Founder. Upon approval, the MWMA Governing Board of Directors will define the criteria for receiving Founder status based upon number of hours and/or type of participation. Founder status will not be conferred based on donations made to the School. Individuals who fail to meet these requirements can have their Founder status revoked. In the event an individual’s students were enrolled under Founder’s status and that status was subsequently revoked pursuant to this

provision, the individual's students will need to enroll in the school through the lottery in subsequent years. Since preferential enrollment will be extended to less than 5% of enrolled students, each Founder and each employee is allotted preferential enrollment for one child.

The School will not give preference to any student and will not make any enrollment decision on any basis prohibited by state or federal law, including federal civil rights laws and IDEA 2004. Specifically, the School will not request any data of applicants other than their name, grade level, and parent contact information prior to the lottery.

The School will follow the provisions of Utah Code § 53A-1a-506.5 and R277-470-5 regarding notifying prospective students and parents and enrolling students.

For each enrollment period during which the School accepts applications from students, the School will publicize that it is accepting applications on the School website.

The School's first lottery for the 2014-15 school year will be conducted during the first week of January 2014 with additional lotteries held periodically as needed until the desired enrollment numbers are reached. For subsequent school years, the first lottery will be held in January or February of each year with additional lotteries held periodically as needed until the desired enrollment numbers are reached. The School may, at the discretion of the School's Director, continue to enroll students from the lottery throughout the school year to fill spots left open when students withdraw.

Appendix B
Budget Form

Planning Year Proposed Budget

Charter School Name: Mountain West Montessori Academy		Fiscal Year: 2014		
Revenue		Planning Year		
Total Revenue From Local Sources (1000)		\$0		
Total Revenue from State Sources (3000)		\$120,000		
Restricted Federal Through State		\$0		
Total Revenue from Federal Sources (4000)		\$0		
Private Grants & Donations :		\$0		
Source(s) <i>(specify)</i>		\$0		
Loans:				
Commercial		\$0		
Contributions and Donations from Private Sources		\$0		
Other <i>(state revolving loan)</i>		\$296,000		
Total Revenue from Other Sources (5000)		\$296,000		
Total Revenue		\$416,000		
Expenditures		Number	Salary or Cost	Total
131	Salaries - Teachers			\$0
132	Salaries - Substitute Teachers			\$0
161	Salaries - Teacher Aides and Paraprofessionals			\$0
100	Salaries - All Other			\$0
	Total Salaries (100)			\$0
210	Retirement			\$0
220	Social Security			\$0
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits <i>(specify)</i>			\$0
	Total Benefits (200)			\$0
300	Purchased Professional and Technical Services			\$0
600	Instructional Supplies			\$0
641	Textbooks			\$55,000
	Total Supplies (600)			\$55,000
700	Property (Instructional Equipment) (700)			\$145,000
800	Other Objects			\$0
810	Dues and Fees			\$0
	Total Other Objects (800)			\$0
Total Instruction (1000)				\$200,000

141	Salaries - Attendance and Social Work Personnel			\$0
142	Salaries - Guidance Personnel			\$0
143	Salaries - Health Services Personnel			\$0
144	Salaries - Psychological Personnel			\$0
152	Salaries - Secretarial and Clerical			\$0
100	Salaries - All Other			\$0
	Total Salaries (100)			\$0
210	Retirement			\$0
220	Social Security			\$0
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits			\$0
	Total Benefits (200)			\$0
300	Purchased Professional and Technical Services			\$0
600	Supplies			\$0
700	Property			\$0
800	Other Objects			\$0
810	Dues and Fees			\$0
	Total Other Objects (800)			\$0
Total Student Support Services (2100)				\$0
145	Salaries - Media Personnel - Certified			\$0
162	Salaries - Media Personnel - Noncertified			\$0
100	Salaries - All Other			\$0
	Total Salaries (100)			\$0
210	Retirement			\$0
220	Social Security			\$0
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits			\$0
	Total Benefits (200)			\$0
300	Purchased Professional and Technical Services			\$0
600	Supplies			\$0
644	Library Books			\$0
650	Periodicals			\$0
660	Audio Visual Materials			\$0
	Total Supplies (600)			\$0
700	Property			\$0
800	Other Objects			\$0
810	Dues and Fees			\$0
	Total Other Objects (800)			\$0
Total Instructional Staff Support Services (2200)				\$0

121	Salaries - Principals and Assistants	1	34,000	\$34,000
152	Salaries - Secretarial and Clerical			\$0
100	Salaries - All Other			\$0
	Total Salaries (100)			\$34,000
210	Retirement			\$0
220	Social Security			\$3,808
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits			\$7,800
	Total Benefits (200)			\$11,608
300	Purchased Professional and Technical Services			\$21,000
600	Supplies			\$11,500
700	Property			\$2,500
800	Other Objects			\$0
810	Dues and Fees			\$0
	Total Other Objects (800)			\$0
Total School Administration (2400)				\$80,608
100	Salaries			\$0
210	Retirement			\$0
220	Social Security			\$0
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits			\$0
	Total Benefits (200)			\$0
300	Purchased Professional and Technical Services			\$0
400	Purchased Property Services			\$0
460	Construction and Remodeling			\$0
	Total Property (400)			\$0
500	Other Purchased Services			\$5,000
600	Supplies			\$0
700	Property			\$0
800	Other Objects			\$0
810	Dues and Fees			\$0
	Total Other Objects (800)			\$0
Total Operation & Maintenance of Facilities (2600)				\$5,000

100	Salaries			\$0
210	Retirement			\$0
220	Social Security			\$0
240	Insurance (Health/Dental/Life)			\$0
200	Other Benefits			\$0
	Total Benefits (200)			\$0
300	Purchased Professional and Technical Services			\$0
400	Purchased Property Services			\$0
460	Construction and Remodeling			\$0
	Total Property (400)			\$0
500	Other Purchased Services			\$0
600	Supplies - New Buildings			\$0
641	Textbooks - New Buildings			\$0
644	Library Books-New Libraries			\$0
	Total Supplies (600)			\$0
710	Land and Improvements			\$0
720	Buildings			\$0
731	Machinery			\$0
732	School Buses			\$0
733	Furniture and Fixtures			\$0
734	Technology Equipment			\$0
735	Non-Bus Vehicles			\$0
739	Other Equipment			\$0
	Total Property (700)			\$0
800	Other Objects (<i>Specify</i>)			\$0
Total Building Acquisition & Instruction (4500)				\$0
1000	Total Local			\$0
3000	Total State			\$120,000
4000	Total Federal			\$0
TOTAL REVENUES				\$120,000
100	Salaries			\$34,000
200	Employee Benefits			\$11,608
300	Purchased Professional and Technical Services			\$21,000
400	Purchased Property Services			\$0
500	Other Purchased Services			\$5,000
600	Supplies			\$66,500
700	Property			\$147,500
800	Other Objects			\$0
TOTAL EXPENDITURES				\$285,608
Excess or Deficiency of Revenues over Expenditures				-\$165,608
Other Sources of Funding (5000)				\$296,000
Net Asset Balance (Fund Balance)				\$130,392
Reserves as Percentage of Total Revenue				109%
Percentage of Funding Contributed to Reserve Balance				-138%
Necessary Closure Fund				\$0

First Operational Year Proposed Budget

Charter School Name: Mountain West Montessori Academy		Fiscal Year: 2015					
First Operational Year		100% Enrollment		75% Enrollment			
Number of Students:		474		356			
Grade Configuration:		K-8		K-8			
Revenue							
Child Nutrition Program (CNP) and Lunchroom Sales		\$0		\$0			
Student Activities		\$0		\$0			
Other		\$20,000		\$15,000			
Total Revenue From Local Sources (1000)		\$20,000		\$15,000			
Total Revenue from State Sources (3000)		\$2,628,271		\$2,034,132			
Lunch and Breakfast Reimbursement		\$0		\$0			
Donated Commodities (CNP)		\$0		\$0			
Restricted Federal Through State		\$0		\$0			
Programs for the Disabled (IDEA)		\$36,540		\$27,405			
No Child Left Behind (NCLB)		\$61,534		\$46,151			
Total Revenue from Federal Sources (4000)		\$98,074		\$73,556			
Private Grants & Donations:		\$0		\$0			
Source(s) (donations)		\$15,000		\$11,250			
Loans:		\$0		\$0			
Commercial		\$0		\$0			
Contributions and Donations from Private Sources		\$0		\$0			
Other (state revolving loan and prior year fund balance)		\$130,392		\$130,392			
Total Revenue from Other Sources (5000)		\$145,392		\$141,642			
Total Revenue		\$2,891,737		\$2,264,329			
Expenditures		Number	Salary or Cost	Total	Number	Salary or Cost	Total
131	Salaries - Teachers	21.00	\$34,500	\$724,500	17.50	\$34,500	\$603,750
132	Salaries - Substitute Teachers			\$13,000			\$9,750
161	Salaries - Teacher Aides and Paraprofessionals	17.00	\$7,200	\$122,400	8.00	\$7,200	\$57,600
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$859,900			\$671,100
210	Retirement			\$0			\$0
220	Social Security			\$89,430			\$69,794
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits (specify)			\$163,800			\$136,500
	Total Benefits (200)			\$253,230			\$206,294
300	Purchased Professional and Technical Services			\$28,000			\$21,000
600	Instructional Supplies			\$35,000			\$26,250
641	Textbooks			\$47,858			\$35,894
	Total Supplies (600)			\$82,858			\$62,144
700	Total Property (Instructional Equipment) (700)			\$105,000			\$78,750
800	Other Objects			\$2,000			\$1,500
810	Dues and Fees			\$2,000			\$1,500
	Total Other Objects (800)			\$4,000			\$3,000
Total Instruction (1000)				\$1,332,988			\$1,042,288

141	Salaries - Attendance and Social Work Personnel			\$0			\$0
142	Salaries - Guidance Personnel	0.50	\$42,250	\$21,125	0.25	\$42,250	\$10,563
143	Salaries - Health Services Personnel			\$0			\$0
144	Salaries - Psychological Personnel			\$0			\$0
152	Salaries - Secretarial and Clerical			\$0			\$0
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$21,125			\$10,563
210	Retirement			\$0			\$0
220	Social Security			\$2,197			\$1,099
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$0			\$0
	Total Benefits (200)			\$2,197			\$1,099
300	Purchased Professional and Technical Services			\$0			\$0
600	Supplies			\$0			\$0
700	Property			\$0			\$0
800	Other Objects - Field Trips			\$5,000			\$3,750
810	Dues and Fees			\$0			\$0
	Total Other Objects (800)			\$5,000			\$3,750
Total Student Support Services (2100)				\$28,322			\$15,411
145	Salaries - Media Personnel - Certified	1.00	\$28,000	\$28,000	0.50	\$28,000	\$14,000
162	Salaries - Media Personnel - Noncertified	0.50	\$11,000	\$5,500	0.50	\$11,000	\$5,500
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$33,500			\$19,500
210	Retirement			\$0			\$0
220	Social Security			\$3,484			\$2,028
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$7,800			\$3,900
	Total Benefits (200)			\$11,284			\$5,928
300	Purchased Professional and Technical Services			\$0			\$0
600	Supplies			\$3,500			\$2,625
644	Library Books			\$10,500			\$7,875
650	Periodicals			\$1,750			\$1,313
660	Audio Visual Materials			\$1,750			\$1,313
	Total Supplies (600)			\$17,500			\$13,125
700	Property			\$10,500			\$7,875
800	Other Objects			\$700			\$525
810	Dues and Fees			\$750			\$563
	Total Other Objects (800)			\$1,450			\$1,088
Total Instructional Staff Support Services (2200)				\$74,234			\$47,516
121	Salaries - Principals and Assistants	1.00	\$68,000	\$68,000	1.00	\$68,000	\$68,000
152	Salaries - Secretarial and Clerical	1.50	\$25,000	\$37,500	1.00	\$25,000	\$25,000
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$105,500			\$93,000
210	Retirement			\$0			\$0
220	Social Security			\$10,972			\$9,672
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$11,700			\$7,800
	Total Benefits (200)			\$22,672			\$17,472
300	Purchased Professional and Technical Services			\$199,600			\$115,538
600	Supplies			\$10,000			\$7,500
700	Property			\$15,000			\$11,250
800	Other Objects			\$2,000			\$1,500
810	Dues and Fees			\$1,500			\$1,125
	Total Other Objects (800)			\$3,500			\$2,625
Total School Administration (2400)				\$356,272			\$247,385

100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$30,000		\$22,500
400	Purchased Property Services			\$504,656		\$504,656
460	Construction and Remodeling			\$0		\$0
	Total Property (400)			\$504,656		\$504,656
500	Other Purchased Services			\$45,000		\$33,750
600	Supplies			\$5,600		\$4,200
700	Property			\$0		\$0
800	Other Objects			\$0		\$0
810	Dues and Fees			\$0		\$0
	Total Other Objects (800)			\$0		\$0
Total Operation & Maintenance of Facilities (2600)				\$540,256		\$531,356
100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$0		\$0
600	Non-Food Supplies			\$0		\$0
630	Food			\$0		\$0
	Total Supplies (600)			\$0		\$0
700	Property			\$0		\$0
780	Depreciation - Kitchen Equipment Depreciation			\$0		\$0
	Total Property (700)			\$0		\$0
800	Other Objects (<i>Specify</i>)			\$0		\$0
Total Food Services (3100)				\$0		\$0
100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$0		\$0
400	Purchased Property Services			\$0		\$0
460	Construction and Remodeling			\$0		\$0
	Total Property (400)			\$0		\$0
500	Other Purchased Services			\$0		\$0
600	Supplies - New Buildings			\$0		\$0
641	Textbooks - New Buildings			\$0		\$0
644	Library Books - New Libraries			\$0		\$0
	Total Supplies (600)			\$0		\$0
710	Land and Improvements			\$0		\$0
720	Buildings			\$0		\$0
731	Machinery			\$0		\$0
732	School Buses			\$0		\$0
733	Furniture and Fixtures			\$0		\$0
734	Technology Equipment			\$0		\$0
735	Non-Bus Vehicles			\$0		\$0
739	Other Equipment			\$0		\$0
	Total Property (700)			\$0		\$0
800	Other Objects (<i>Specify</i>)			\$0		\$0
Total Building Acquisition & Instruction (4500)				\$0		\$0
830	Interest			\$4,568		\$4,568
840	Redemption of Principal			\$31,203		\$31,203
Total other financing sources (uses) and other items				\$35,771		\$35,771

1000	Total Local			\$20,000			\$15,000
3000	Total State			\$2,628,271			\$2,034,132
4000	Total Federal			\$98,074			\$73,556
TOTAL REVENUES				\$2,746,345			\$2,122,687
100	Salaries			\$1,020,025			\$794,163
200	Employee Benefits			\$289,383			\$230,793
300	Purchased Professional and Technical Services			\$257,600			\$159,038
400	Purchased Property Services			\$504,656			\$504,656
500	Other Purchased Services			\$45,000			\$33,750
600	Supplies			\$115,958			\$86,969
700	Property			\$130,500			\$97,875
800	Other Objects			\$49,721			\$46,233
TOTAL EXPENDITURES				\$2,412,842			\$1,953,476
Excess or Deficiency of Revenues over Expenditures				\$333,503			\$169,212
Other Sources of Funding (5000)				\$145,392			\$141,642
Net Asset Balance (Fund Balance)				\$478,895			\$310,854
Reserves as Percentage of Total Revenue				17%			15%
Percentage of Funding Contributed to Reserve Balance				12%			8%
Necessary Closure Fund				\$92,396			\$91,815

Second Operational Year Proposed Budget

Charter School Name: Mountain West Montessori Academy		Fiscal Year: 2016					
Second Operational Year		100% Enrollment			75% Enrollment		
Number of Students:		536			402		
Grade Configuration:		K-9			K-9		
Revenue							
Child Nutrition Program (CNP) and Lunchroom Sales		\$0			\$0		
Student Activities		\$0			\$0		
Other		\$25,000			\$18,750		
Total Revenue From Local Sources (1000)		\$25,000			\$18,750		
Total Revenue from State Sources (3000)		\$2,886,276			\$2,155,870		
Lunch and Breakfast Reimbursement		\$0			\$0		
Donated Commodities (CNP)		\$0			\$0		
Restricted Federal Through State		\$0			\$0		
Programs for the Disabled (IDEA)		\$41,319			\$30,990		
No Child Left Behind (NCLB)		\$69,583			\$52,187		
Total Revenue from Federal Sources (4000)		\$110,902			\$83,177		
Private Grants & Donations:		\$0			\$0		
Source(s) (donations)		\$15,000			\$11,250		
Loans:		\$0			\$0		
Commercial		\$0			\$0		
Contributions and Donations from Private Sources		\$0			\$0		
Other (Prior year fund balance)		\$478,895			\$310,854		
Total Revenue from Other Sources (5000)		\$493,895			\$322,104		
Total Revenue		\$3,516,073			\$442,781		
Expenditures							
		Number	Salary or Cost	Total	Number	Salary or Cost	Total
131	Salaries - Teachers	23.00	\$34,845	\$801,435	17.50	\$34,845	\$609,788
132	Salaries - Substitute Teachers			\$10,084			\$7,563
161	Salaries - Teacher Aides and Paraprofessionals	18.00	\$7,272	\$130,896	8.00	\$7,272	\$58,176
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$942,415			\$675,526
210	Retirement			\$0			\$0
220	Social Security			\$98,011			\$70,255
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits (specify)			\$186,300			\$141,750
	Total Benefits (200)			\$284,311			\$212,005
300	Purchased Professional and Technical Services			\$25,000			\$18,750
600	Instructional Supplies			\$39,578			\$29,684
641	Textbooks			\$60,850			\$45,638
	Total Supplies (600)			\$100,428			\$75,321
700	Total Property (Instructional Equipment) (700)			\$76,400			\$57,300
800	Other Objects			\$2,000			\$1,500
810	Dues and Fees			\$2,000			\$1,500
	Total Other Objects (800)			\$4,000			\$3,000
Total Instruction (1000)				\$1,432,554			\$1,041,902

141	Salaries - Attendance and Social Work Personnel			\$0			\$0
142	Salaries - Guidance Personnel	1.00	\$42,250	\$42,250	0.50	\$42,250	\$21,125
143	Salaries - Health Services Personnel			\$0			\$0
144	Salaries - Psychological Personnel			\$0			\$0
152	Salaries - Secretarial and Clerical			\$0			\$0
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$42,250			\$21,125
210	Retirement			\$0			\$0
220	Social Security			\$4,394			\$2,197
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$8,100			\$4,050
	Total Benefits (200)			\$12,494			\$6,247
300	Purchased Professional and Technical Services			\$0			\$0
600	Supplies			\$0			\$0
700	Property			\$0			\$0
800	Other Objects - Field Trips			\$5,000			\$3,750
810	Dues and Fees			\$0			\$0
	Total Other Objects (800)			\$5,000			\$3,750
Total Student Support Services (2100)				\$59,744			\$31,122
145	Salaries - Media Personnel - Certified	1.00	\$28,280	\$28,280	0.75	\$28,280	\$21,210
162	Salaries - Media Personnel - Noncertified	0.50	\$11,110	\$5,555	0.50	\$11,110	\$5,555
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$33,835			\$26,765
210	Retirement			\$0			\$0
220	Social Security			\$3,519			\$2,784
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$8,100			\$6,075
	Total Benefits (200)			\$11,619			\$8,859
300	Purchased Professional and Technical Services			\$0			\$0
600	Supplies			\$3,958			\$2,968
644	Library Books			\$8,000			\$6,000
650	Periodicals			\$1,979			\$1,484
660	Audio Visual Materials			\$1,979			\$1,484
	Total Supplies (600)			\$15,916			\$11,937
700	Property			\$8,000			\$6,000
800	Other Objects			\$750			\$563
810	Dues and Fees			\$750			\$563
	Total Other Objects (800)			\$1,500			\$1,125
Total Instructional Staff Support Services (2200)				\$70,869			\$54,685
121	Salaries - Principals and Assistants	2.00	\$57,500	\$115,000	1.50	\$57,500	\$86,250
152	Salaries - Secretarial and Clerical	1.50	\$25,250	\$37,875	1.00	\$25,000	\$25,000
100	Salaries - All Other			\$0			\$0
	Total Salaries (100)			\$152,875			\$111,250
210	Retirement			\$0			\$0
220	Social Security			\$15,899			\$11,570
240	Insurance (Health/Dental/Life)			\$0			\$0
200	Other Benefits			\$28,350			\$20,250
	Total Benefits (200)			\$44,249			\$31,820
300	Purchased Professional and Technical Services			\$160,800			\$120,600
600	Supplies			\$3,878			\$2,909
700	Property			\$5,000			\$3,750
800	Other Objects			\$1,551			\$1,164
810	Dues and Fees			\$1,164			\$873
	Total Other Objects (800)			\$2,715			\$2,036
Total School Administration (2400)				\$369,517			\$272,365

100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$25,000		\$18,750
400	Purchased Property Services			\$576,750		\$576,750
460	Construction and Remodeling			\$0		\$0
	Total Property (400)			\$576,750		\$576,750
500	Other Purchased Services			\$45,000		\$33,750
600	Supplies			\$4,950		\$3,713
700	Property			\$0		\$0
800	Other Objects			\$0		\$0
810	Dues and Fees			\$15,000		\$11,250
	Total Other Objects (800)			\$15,000		\$11,250
Total Operation & Maintenance of Facilities (2600)				\$621,700		\$610,463
100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$0		\$0
600	Non-Food Supplies			\$0		\$0
630	Food			\$0		\$0
	Total Supplies (600)			\$0		\$0
700	Property			\$0		\$0
780	Depreciation - Kitchen Equipment Depreciation			\$0		\$0
	Total Property (700)			\$0		\$0
800	Other Objects (Specify)			\$0		\$0
Total Food Services (3100)				\$0		\$0
100	Salaries			\$0		\$0
210	Retirement			\$0		\$0
220	Social Security			\$0		\$0
240	Insurance (Health/Dental/Life)			\$0		\$0
200	Other Benefits			\$0		\$0
	Total Benefits (200)			\$0		\$0
300	Purchased Professional and Technical Services			\$0		\$0
400	Purchased Property Services			\$0		\$0
460	Construction and Remodeling			\$0		\$0
	Total Property (400)			\$0		\$0
500	Other Purchased Services			\$0		\$0
600	Supplies - New Buildings			\$0		\$0
641	Textbooks - New Buildings			\$0		\$0
644	Library Books - New Libraries			\$0		\$0
	Total Supplies (600)			\$0		\$0
710	Land and Improvements			\$0		\$0
720	Buildings			\$0		\$0
731	Machinery			\$0		\$0
732	School Buses			\$0		\$0
733	Furniture and Fixtures			\$0		\$0
734	Technology Equipment			\$0		\$0
735	Non-Bus Vehicles			\$0		\$0
739	Other Equipment			\$0		\$0
	Total Property (700)			\$0		\$0
800	Other Objects (Specify)			\$0		\$0
Total Building Acquisition & Instruction (4500)				\$0		\$0
830	Interest			\$3,501		\$3,501
840	Redemption of Principal			\$74,544		\$74,544
Total other financing sources (uses) and other items				\$78,045		\$78,045

1000	Total Local			\$25,000		\$18,750
3000	Total State			\$2,886,276		\$2,155,870
4000	Total Federal			\$110,902		\$83,177
TOTAL REVENUES				\$3,022,178		\$2,257,797
100	Salaries			\$1,171,375		\$834,666
200	Employee Benefits			\$352,673		\$258,930
300	Purchased Professional and Technical Services			\$210,800		\$158,100
400	Purchased Property Services			\$576,750		\$576,750
500	Other Purchased Services			\$45,000		\$33,750
600	Supplies			\$125,172		\$93,879
700	Property			\$89,400		\$67,050
800	Other Objects			\$106,260		\$99,206
TOTAL EXPENDITURES				\$2,677,430		\$2,122,332
Excess or Deficiency of Revenues over Expenditures				\$344,749		\$135,465
Other Sources of Funding (5000)				\$493,895		\$322,104
Net Asset Balance (Fund Balance)				\$838,643		\$457,568
Reserves as Percentage of Total Revenue				28%		20%
Percentage of Funding Contributed to Reserve Balance				11%		6%
Necessary Closure Fund				\$113,835		\$112,659



State Funding Worksheets

First Operational Year

CHARTER SCHOOL WORKSHEET

FY 2014 - 2015

*****PROJECTION ONLY*****

TEMPLATE

School Name	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	50		0.55 27.5
Estimated ADM (1-3)	150		0.9 135
Estimated ADM (4-6)	150		0.9 135
Estimated ADM (7-8)	124		0.99 122.76
Estimated ADM (9-12)	0		1.2 0
Special Ed Pre-School	0		
Special Ed ADM (K)	5		
Special Ed ADM (1-12)	47		
Special Ed (Self-Contained)	3		
Number of Teachers (K-6)	14		
Number of Teachers (7-12)	7.5		
WPU Value	\$2,842		
No. of Teachers (FTE) (CACTUS)	0		
School Administrators (CACTUS)	1		
Prior Year WPUs	0		
Low Income Students-prior year	0		

(Except for CTE Add-on and Special Ed.)

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	420.2600	\$ 1,194,379
Professional Staff	0.05500	23.1143	65,691
Restricted Basic School:			
Special Ed--Add-on	1.0000	52.7500	135,937
Spec. Ed. Self-Contained	1.0000	3.0000	8,526
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$248.76 per K-8 ADM		117,912
Total WPU Programs		499.1243	\$ 1,522,445
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$ 29.76 per WPU		\$ 14,854
Special Populations			
Enhancement for At-Risk Students	\$18.90 per student		8,959
Enhancement for Accelerated Students	\$3.96 per student		1,877
Other			
School Land Trust Program	\$37.67 per student		-
Reading Achievement Program	\$15.97 per WPUs		7,971
	\$2.04 per K-3 student		408
	\$32.96 per low income student		-
Charter Administrative Costs	\$100 per student		47,400
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		112,123
ESA-School Administrators	\$2,500 per qualified administrator		3,104
Local Replacement Dollars	Average \$1,687 per student		804,699
Total Non-WPU			\$ 1,001,394
One Time			
Teacher Materials/Supplies	\$250 or \$175 per teacher (K-6) ¹	14	2,450
	\$200 or \$150 per teacher (7-12) ²	7.5	1,125
Library Books and Resources	\$0.84 per student	477	401
Total One Time			\$ 3,976
ESTIMATED Total All State Funding			\$ 2,553,271

CHARTER SCHOOL WORKSHEET

FY 2014 - 2015

*****PROJECTION ONLY*****

TEMPLATE

School Name

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	37.5		0.55 20,625
Estimated ADM (1-3)	112.5		0.9 101.25
Estimated ADM (4-6)	112.5		0.9 101.25
Estimated ADM (7-8)	93		0.99 92.07
Estimated ADM (9-12)	0		1.2 0
Special Ed Pre-School	0		
Special Ed ADM (K)	3.75		
Special Ed ADM (1-12)	35.25		
Special Ed (Self-Contained)	2.25		
Number of Teachers (K-6)	12		
Number of Teachers (7-12)	5,625		
WPU Value	\$2,842		
No. of Teachers (FTE) (CACTUS)	0		<i>(Except for CTE Add-on and Special Ed.)</i>
School Administrators (CACTUS)	1		
Prior Year WPUs	0		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	315.1950	\$ 895,784
Professional Staff	0.05500	17.3357	49,268
Restricted Basic School:			
Special Ed--Add-on	1.0000	39.5625	101,953
Spec. Ed. Self-Contained	1.0000	2.2500	6,395
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$248.76 per K-8 ADM		88,434
Total WPU Programs		374.3432	\$ 1,141,834
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$ 29.76 per WPU		\$ 11,140
Special Populations			
Enhancement for At-Risk Students	\$18.90 per student		6,719
Enhancement for Accelerated Students	\$3.96 per student		1,408
Other			
School Land Trust Program	\$37.67 per student		-
Reading Achievement Program	\$15.97 per WPUs		5,978
	\$2.04 per K-3 student		306
	\$32.96 per low income student		-
Charter Administrative Costs	\$100 per student		35,550
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		91,914
ESA-School Administrators	\$2,500 per qualified administrator		3,104
Local Replacement Dollars	Average \$1,687 per student		603,524
Total Non-WPU			\$ 759,644
One Time			
Teacher Materials/Supplies	\$250 or \$175 per teacher (K-6) ¹	12	2,100
	\$200 or \$150 per teacher (7-12) ²	5,625	844
Library Books and Resources	\$0.84 per student	357.75	301
Total One Time			\$ 3,244
ESTIMATED Total All State Funding			\$ 1,930,179



Second Operational Year

CHARTER SCHOOL WORKSHEET

FY 2015 - 2016

*****PROJECTION ONLY*****

TEMPLATE

School Name	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	50		0.55 27.5
Estimated ADM (1-3)	150		0.9 135
Estimated ADM (4-6)	150		0.9 135
Estimated ADM (7-8)	124		0.99 122.76
Estimated ADM (9-12)	62		1.2 74.4
Special Ed Pre-School	0		
Special Ed ADM (K)	6		
Special Ed ADM (1-12)	47.4		
Special Ed (Self-Contained)	5		
Number of Teachers (K-6)	14		
Number of Teachers (7-12)	7.5		
WPU Value	\$2,842		
No. of Teachers (FTE) (CACTUS)	0		
School Administrators (CACTUS)	0		
Prior Year WPUs	0		
Low Income Students-prior year	0		

(Except for CTE Add-on and Special Ed.)

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	494.6600	\$ 1,405,824
Professional Staff	0.05500	27.2063	77,320
Restricted Basic School:			
Special Ed--Add-on	1.0000	55.7000	143,539
Spec. Ed. Self-Contained	1.0000	5.0000	14,210
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$248.76 per K-8 ADM		117,912
Total WPU Programs		582.5663	\$ 1,758,805
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$ 29.76 per WPU		\$ 17,337
Special Populations			
Enhancement for At-Risk Students	\$18.90 per student		10,130
Enhancement for Accelerated Students	\$3.96 per student		2,123
Other			
School Land Trust Program	\$37.67 per student		17,856
Reading Achievement Program	\$15.97 per WPUs		9,304
	\$2.04 per K-3 student		408
	\$32.96 per low income student		-
Charter Administrative Costs	\$100 per student		53,600
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		-
ESA-School Administrators	\$2,500 per qualified administrator		-
Local Replacement Dollars	Average \$1,687 per student		912,667
Total Non-WPU			\$ 1,023,424
One Time			
Teacher Materials/Supplies	\$250 or \$175 per teacher (K-6) ¹	14	2,450
	\$200 or \$150 per teacher (7-12) ²	7.5	1,125
Library Books and Resources	\$0.84 per student	541	454
Total One Time			\$ 4,029
ESTIMATED Total All State Funding			\$ 2,814,065



CHARTER SCHOOL WORKSHEET

FY 2015 - 2016

*****PROJECTION ONLY*****

TEMPLATE

School Name

	Average Daily Membership	Rating Factor	WPU Generated
Estimated ADM (K)	37.5		0.55
Estimated ADM (1-3)	112.5		0.9
Estimated ADM (4-6)	112.5		0.9
Estimated ADM (7-8)	93		0.99
Estimated ADM (9-12)	46.5		1.2
Special Ed Pre-School	0		
Special Ed ADM (K)	4.5		
Special Ed ADM (1-12)	26.66		
Special Ed (Self-Contained)	3.75		
Number of Teachers (K-6)	12		
Number of Teachers (7-12)	5.625		
WPU Value	\$2,842		
No. of Teachers (FTE) (CACTUS)	0		
School Administrators (CACTUS)	0		
Prior Year WPUs	0		
Low Income Students-prior year	0		

(Except for CTE Add-on and Special Ed.)

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	370.9950	\$ 1,054,368
Professional Staff	0.05500	20.4047	57,990
Restricted Basic School:			
Special Ed--Add-on	1.0000	32.8875	84,751
Spec. Ed. Self-Contained	1.0000	3.7500	10,658
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$248.76 per K-8 ADM		88,434
Total WPU Programs		428.0372	\$ 1,296,201
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$ 29.76 per WPU		\$ 12,738
Special Populations			
Enhancement for At-Risk Students	\$18.90 per student		7,598
Enhancement for Accelerated Students	\$3.96 per student		1,592
Other			
School Land Trust Program	\$37.67 per student		13,392
Reading Achievement Program	\$15.97 per WPUs		6,836
	\$2.04 per K-3 student		306
	\$32.96 per low income student		-
Charter Administrative Costs	\$100 per student		40,200
Educator Salary Adjustment (ESA)	\$4,200 per qualified educator plus benefits		-
ESA-School Administrators	\$2,500 per qualified administrator		-
Local Replacement Dollars	Average \$1,687 per student		684,500
Total Non-WPU			\$ 767,162
One Time			
Teacher Materials/Supplies	\$250 or \$175 per teacher (K-6) ¹	12	2,100
	\$200 or \$150 per teacher (7-12) ²	5.625	844
Library Books and Resources	\$0.84 per student	405.75	341
Total One Time			\$ 3,285
ESTIMATED Total All State Funding			\$ 2,094,453



Appendix C
Purchasing Policies and Procedures

Approved Purchasing Policy & Procedures

Mountain West Montessori Academy
Policy: Purchasing Policy and Procedures
Approved: March 16, 2012

Purpose:

The purpose of the Purchasing Policy and Procedures (PP&P) is to provide Mountain West Montessori Academy's administration and board of directors with a uniform and systematic method of purchasing goods and services required by the school to define responsibilities and authority of the school Director, and to advise of the purchasing requirements and limitations imposed by state law. MWMA will follow all provisions contained in the State of Utah Purchasing Policies and Procedures. Such procedures shall consider conflict of interest, fairness, ethical conduct, bid procedures, etc.

Purchasing:

The responsibility for approving purchases is delegated to the school's Director by the board of directors as set forth below.

During the first operating calendar year of the MWMA, all purchases over \$5,000 must receive board approval. For subsequent years, purchases up to \$2,500 must be approved by the Director, purchases between \$2,500 and \$5,000 must be approved by either the Board President or Board Treasurer, and purchases over \$5,000 must be approved by the full board of directors. Invoices, purchases orders, and authorized facsimiles must be signed by the appropriate individual.

Employee purchases that require reimbursement are discouraged.

Purchases for travel that require the use of a credit card are to follow the purchasing / disbursement process utilizing a purchase order. MWMA's Education Services Provider will retain the credit card for making such purchases and only utilize the credit card when required to do so.

Disbursements:

The responsibility for disbursement is delegating to MWMA's Education Services Provider as set forth below.

Disbursements are handled in such a manner as to ensure that the proper funds and accounts are charged; that the disbursement is used only for authorized purposes; and that laws, rules and regulations governing the disbursements, and handling of public funds are followed.

The following controls are established to assure that all payments are made on a timely basis and in accordance with all purchase orders and contracts:

- Purchase order shall be completely filled out prior to purchase.
- Purchase order shall be signed by appropriate authorizing personnel
- Completed purchase orders are to be sent to MWMA's Education Services Provider / business manager.
- Prior to payment being made, MWMA's Education Services Provider / business manager will require a valid invoice and properly completed purchase order.
- Disbursements are to be made primarily by check with counter signatures to provide additional control.
- If approved by the board, blank warrants / checks may be kept in locked storage under the control of a designated, responsible employee at the school. Access to blank checks must be limited to this employee and a designated alternate. When blank checks are received; the date, quantity, and inclusive serial numbers are recorded and added to the total balance on hand. When a blank check is used, the stub along with a copy of the receipt is to be signed by the Director and given to the Education Services Provider / business manager. The use of these blank checks should be kept to an absolute minimum.

Signature:


Angie Johnson, Board President

3/16/2012
Date

Appendix D
Suspension/Expulsion Policy

Proposed Suspension/Expulsion Policy

1. PURPOSE, BELIEFS, AND PHILOSOPHY

1.1 Purpose

The purpose of Mountain West Montessori Academy’s (the “School”) Safe Schools Policy is to help all students develop positive relationships with other students and adults, take responsibility for their actions and learning, and develop the self-discipline necessary to create an environment that is characterized by physical and emotional safety in order to enhance learning for everyone.

1.2 Beliefs and Expectations

The School’s beliefs and expectations set a positive and inviting culture for dealing with student behavior issues.

Beliefs:

- Punishment alone will not change behavior
- Much aggressive behavior is a relationship problem, not a behavior problem
- Adults must model the behaviors they expect from the students
- We expect conflicts, but we expect conflicts to be resolved and relationships mended

Expectations:

- Students will show respect for other students
- Students will show respect for adults
- Students will show respect for the building
- Adults will show respect for students
- Students will develop self-discipline

1.3 Procedural Philosophy

The School recognizes that establishing a procedural philosophy consistent with the desired positive school environment is as important as following legal and due process procedures. The School’s policy sets forth appropriate legal and due process procedures and will be followed within the context of the procedural philosophy outlined below:

Procedures:

When students are involved in conflicts with other students, they will:

- Work together to resolve the conflict
- Work to repair the relationship and build trust
- Be subject to additional consequences if they exhibit unsafe behaviors during the conflict

When students are involved in a conflict with or feel they have been treated unfairly by a member of the staff or a volunteer:

- Students are encouraged to address the issue with the other individual involved and work reasonably and in good faith to resolve the concern
- If that does not successfully resolve the issue, the student should report their feelings to their parent or to the administrator or counselor, who will work together to set up a conference with the student, the parent, an administrator or counselor, and the adult involved in order to resolve the conflict and mend the relationship

When students flagrantly disregard the safety of others, show blatant disrespect to others, or consistently behave in a disrespectful or unsafe way:

- The student will be subjected to consequences and positive behavior support to ensure that the student will make better choices in the future. Consequences might include:
 - In-School Suspension
 - Out of School Suspension
 - Expulsion
 - Restitution
 - Repayment for damages
- The student will work to earn back the trust of the school community by actions such as:
 - Genuine apology to injured or affected parties
 - Demonstration of appropriate behaviors following the incident
 - Repair or replace any damaged items

Due process to protect the rights of students will include:

- All students will be treated with dignity and respect as they go through correction procedures. The administration will see to it that their rights are protected through the process. If parents feel their student has not been treated fairly, they may request a hearing with the School's Governing Board of Directors (the "**Board**") in accordance with the School's Grievance Policy.
- Parents will be notified when students are involved in situations that are deemed to be serious.
- Parents and students will be notified of the expectations, possible consequences, and the procedures involved in this policy at the beginning of each school year.

2. ENVIRONMENT

2.1 Safe School Environment

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

2.2 Discrimination Prohibited

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

3. DEFINITIONS

3.1 Suspension

For purposes of this policy, suspension is a temporary removal of a student from School and School-sponsored activities for a period of up to one (1) year. A student who is suspended may, to the extent feasible and at the Director's discretion, have access to homework, tests, and other schoolwork through a home study program but will not be allowed to attend classes or participate in any School activities during the period of suspension.

3.2 Expulsion

For purposes of this policy, expulsion means the formal process of dismissing a student from School. Recognizing that students who commit violent or disruptive acts may pose safety problems, the School will work with parents to provide alternative educational placement and programs for the student where appropriate and feasible. However, the Director retains the authority to exclude the student from all programs or activities for the period of expulsion.

3.3 Change of Placement for Students with Disabilities under IDEA and Section 504

For purpose of the removal of a student with a disability from the student's current educational placement, a "change of placement" occurs if (a) the removal is for more than ten (10) consecutive school days or (b) the student is subjected to a series of removals that constitute a pattern because they total more than ten (10) school days in a school year or because of factors such as the length of each removal, the total amount of time the student is removed, and the

proximity of the removals to one another. Any "change of placement" requires compliance with the procedures outlined in Section 10 of this policy.

3.4 Disruptive Student Behavior

For purposes of this policy, "disruptive student behavior" means the behavior identified as grounds for suspension or expulsion described in Section 4.1, below.

3.5 Parent

For purposes of this policy, "parent" means (i) a custodial parent of a school-age minor; (ii) a legally appointed guardian of a school-age minor; or (iii) any other person purporting to exercise any authority over the minor which could be exercised by a person described above.

3.6 Qualifying Minor

For purposes of this policy, "qualifying minor" means a school-age minor who: (i) is at least nine years old; or (ii) turns nine years old at any time during the school year.

3.7 School Year

For purposes of this policy, "school year" means the period of time designated as the school year by the Board in the calendar adopted each year.

4. GROUNDS FOR SUSPENSION, EXPULSION, OR CHANGE OF PLACEMENT

4.1 Suspension

4.1.1 A student may be suspended from School for any of the following reasons:

[a] frequent, flagrant, or willful disobedience, defiance of proper authority, or disruptive behavior, including, but not limited to: fighting; gang activity; noncompliance with School dress code; harassment, including sexual, racial, or religious harassment; the use of foul, profane, vulgar or abusive language; or other unreasonable and substantial disruption of a class, activity, or other function of the School;

[b] willful destruction or defacing of School property;

[c] behavior that poses an immediate and significant threat to the welfare, safety, or morals of other students or School personnel or to the operation of the School;

[d] possession, distribution, control, use, sale, or arranging for the sale of an alcoholic beverage as defined in Utah Code Ann. § 32A-1-105;

[e] possession, distribution, control, use, sale, or arranging for the sale of cigars, cigarettes, electronic cigarettes, or tobacco, as defined by Utah Code Ann. § 76-10-101;

[f] possession, distribution, control, use, sale, or arranging for the sale of contraband, including but not limited to real, look-alike or pretend weapons, fireworks, matches, lighters, alcohol, tobacco, mace, pepper spray, laser pointers, pornography, illegal drugs and controlled substances, drug paraphernalia, or any other material or item that has caused or will imminently cause substantial disruption to school operations;

[g] inappropriate use or possession of electronic devices in class or in any other way that substantially disrupts the educational environment;

[h] any criminal activity;

[j] any serious violation involving weapons, drugs, or the use of force that threatens harm or causes harm to the School or School property, to a person associated with the School, or property associated with any such person, regardless of where it occurs; or

[k] bullying or hazing as defined in Utah Code Ann. § 53A-11a-102 and/or the School's Bullying and Hazing Policy.

4.1.2 A student shall be suspended or expelled from School for

[a] any serious violation affecting another student or a staff member, or any serious violation occurring in a School building, in or on School property, or in conjunction with any School-sponsored activity, including:

(i) the possession, control, or actual or threatened use of a real weapon, explosive, or noxious or flammable material;

(ii) the actual or threatened use of a lookalike weapon with intent to intimidate another person or to disrupt normal School activities; or

(iii) the sale, control, or distribution of a drug or controlled substance as defined in Utah Code Ann. § 58-37-2, an imitation controlled substance defined in Utah Code Ann. § 58-37b-2, or drug paraphernalia as defined in Utah Code Ann. § 58-37a-3; or

[b] the commission of an act involving the use of force or the threatened use of force which if committed by an adult would be a felony or class A misdemeanor.

4.2 Expulsion

A student may be expelled from School for any violation listed under Section 4.1 of this policy if the violation is serious or persistent.

4.3 Weapons – Mandatory Expulsion for One Year – Utah Code Ann. § 53a-11-904(2)(b); 20 U.S.C. § 7151

4.3.1 Any student who commits an act for which mandatory suspension or expulsion is provided under Section 4.1.2, above, using a real or lookalike weapon, explosive, or noxious or flammable material shall be expelled from all School programs and activities for a period of not less than one (1) year, subject to the following:

[a] Within forty-five (45) days after the expulsion, the student shall appear before the Case Management Team (“CMT”), which shall be comprised of the Director, a Board Member, and a teacher selected by them, accompanied by a parent or legal guardian; and

[b] The CMT shall determine:

(i) what conditions must be met by the student and the student's parent for the student to return to School;

(ii) if the student should be placed on probation in a regular school setting consistent with Utah Code Ann. § 53A-11-907, and what conditions must be met by the student in order to ensure the safety of students and faculty at the School; and

(iii) if it would be in the best interest of both the School and the student to modify the expulsion term to less than a year giving highest priority to providing a safe school environment for all students.

[c] For purposes of this policy, the term "firearm", "explosive", and "noxious or flammable material" include but are not limited to: guns, starter pistols, cap guns, bombs, bullets and ammunition, gasoline or other flammable liquids, mace, pepper spray, matches, and lighters.

4.3.2 Students with Disabilities under IDEA and Section 504

Whenever a student receiving special education and related services under the Individuals with Disabilities Education Act (“IDEA”) or Section 504 of the Rehabilitation Act is determined to have carried a weapon to School or a School-sponsored activity, the procedures outlined in Section 10 of this policy must be followed.

4.4 Drugs and Controlled Substances – Mandatory Suspension or Expulsion – Utah Code Ann. § 53A-11-904(2)(a)

4.4.1 A student shall be suspended or expelled from the School for any of the following reasons:

[a] use, control, possession, distribution, sale, or arranging for the sale of an illegal drug or controlled substance (which includes alcohol), an imitation controlled substance, or drug

paraphernalia in a school building, in a school vehicle, on School property, or in conjunction with any School-sponsored activity.

[b]misuse or abuse, distribution, sale or arranging for the sale of prescription medication at School or a School-sponsored activity.

[c]misuse or abuse of over-the-counter remedies, or sharing, distribution, sale, or arranging for the sale of over-the-counter remedies. A student may possess and use over-the-counter remedies at School only in amounts not to exceed the recommended daily dose including, but not limited to: aspirin, ibuprofen, Tylenol (acetaminophen), cough drops, allergy medication, cough syrup and mouthwash.

4.4.2 Students with Disabilities under Section 504

Any student identified as being disabled under either Section 504 of the Rehabilitation Act or the Americans with Disabilities Act who currently is engaging in the illegal use of drugs or alcohol shall be suspended or expelled to the same extent as non-disabled students for the possession, use, control, distribution, sale, or arrangement of the sale of illegal drugs, alcohol, or controlled substances on School property or in conjunction with any School-sponsored activity.

4.4.3 Drug Testing

[a]Any student who is reasonably suspected of violating section 4.4 may be subject to a drug test for cause, arranged and paid for by the School.

[b]Any student who has been suspended or expelled for a violation of section 4.4 may be required to provide a clean drug test and evidence of completion of drug assessment and/or drug counseling programs as a condition of readmission to School. Testing and counseling required as a condition of readmission rather than for the purpose of providing justification for the initial suspension or expulsion shall be arranged and paid for by the student's parent or guardian.

[c]Students who refuse to submit to required drug testing and counseling programs or to cooperate with School officials with respect to the sharing of appropriate information, may be expelled from the School.

[d]Any student who is suspended or expelled for violation of section 4.4 may be subject to random drug testing, at any time and for any reason, for a period of one year from the date of offense. If the student tests positive, he/she may be expelled from all School programs or activities. Any student who refuses consent for random drug testing under these conditions shall be expelled from all School programs or activities.

4.4.4 Students with Disabilities under IDEA

Whenever a student receiving special education and related services under IDEA knowingly possesses or uses illegal drugs or sells or solicits the sale of a controlled substance while at School or a School-sponsored activity, the procedures outlined in Section 9 of this policy must be followed.

4.5 Gangs

For purposes of this policy, "gang" means any ongoing organization, association or group of three or more persons, whether formal or informal, having as one its primary activities the commission of criminal acts, which has a unique name or identifiable signs, symbols, or marks, and whose members individually or collectively engage in criminal or violent behavior to persons or property, or who create an unreasonable and substantial disruption or risk of disruption of a class, activity, program, or other function of a school.

4.5.1 Gang Activity and Apparel Prohibited

Students who engage in any form of gang activity on or about School property, or at any School-sponsored activity may be suspended or expelled under the terms of this policy. For the purposes of this policy, "gang activities" include, but are not limited to any of the following.

[a] Wearing, possessing, using, distributing, displaying, or selling any clothing, jewelry, apparel, emblems, badges, tattoos or manner of grooming, accessories, symbols, signs, or other thing which is evidence of membership in or affiliation with any gang;

[b] Committing any act or omission or using any speech, either verbal or nonverbal, (flashing signs, gestures, hand shakes, etc.) that demonstrates membership in or a affiliation with a gang;

[c] Soliciting others for membership in a gang;

[d] Requesting any person to pay for "protection", claiming "turf", or otherwise intimidating, bullying, retaliating against, threatening, or harassing any person;

[e] Possessing a weapon, controlled substances, drug paraphernalia, or other contraband;

[f] Committing any illegal act;

[g] Encouraging or inciting another person to act with physical violence upon any other person or cause damage to property.

4.5.2 Confiscation of Gang Items

Subject to the search and seizure provisions of this policy, gang paraphernalia, apparel, or weapons may be confiscated by School officials at any time.

4.5.3 Consultation with Law Enforcement Authorities

School officials shall consult with local law enforcement authorities and gang detectives whenever they have questions regarding gang-related clothing, apparel, or other gang activity.

5. AUTHORITY TO SUSPEND OR EXPEL

5.1 Authority to Suspend for Ten (10) School Days or Less for Regular Education Students

The Director has the authority to suspend a regular education student for up to ten (10) school days. In considering whether to suspend a student, the Director shall consider all relevant factors, including but not limited to, the severity of the offense, the student's age, disability, academic status and disciplinary record, parental capabilities, and community resources.

5.2 Authority to Suspend and Duration of Suspension for Students with Disabilities

The Director has the authority to suspend a student with disabilities (504 or IDEA) for not more than ten (10) consecutive school days, and additional removals of not more than ten (10) total school days in that same school year for separate incidents of misconduct as long as those removals do not constitute a pattern resulting in a change of placement. The School need not provide services during periods of removal of ten (10) days cumulative or less if services are not provided to a student without disabilities who has been similarly suspended.

5.3 Authority to Suspend for Longer than Ten (10) Days or Expel for Regular Education Students

Subject to the requirements for due process set forth in Section 9, below, the Director may suspend a regular education student for longer than ten (10) days or expel a regular education student.

Expulsions shall be reviewed by the CMT and the conclusions reported to the Board at least once each year if the parent/guardian of the expelled student has expressed a desire for the student to return to the School.

5.3.1 Parental Responsibility

If a student is suspended for a period longer than ten (10) days or expelled, the student's parent or legal guardian is responsible for undertaking an alternative education plan that will ensure that the student's education continues during the period of expulsion. The parent or guardian shall

work with designated School officials to determine how the student's education will continue through private education paid for by the parents, an alternative program offered by the local school district, or other alternatives which will reasonably meet the educational needs of the student. Costs of educational services which are not provided by the School are the responsibility of the student's parent or guardian.

5.3.2 The parent or guardian and designated School officials may enlist the cooperation of the Division of Child and Family Services, the juvenile court, law enforcement, or other appropriate government agencies in determining how to meet the educational needs of the student.

5.3.3 The School shall contact the parent or guardian of each student under age 16 who has been expelled from all School programs and services at least once a month to determine the student's progress if the parent/guardian of the expelled student has expressed a desire for the student to return to the School.

5.4 Authority to Institute Change of Placement for Student with Disabilities

Where the student is receiving special education services or accommodations on the basis of disability under IDEA, 504, or ADA, procedures outlined in the State of Utah Special Education Rules shall be followed, including prior written notice to parents or guardians regarding their procedural due process rights, before any long-term disciplinary action or change of placement takes place.

6. PROCEDURES FOR ADDRESSING DISRUPTIVE STUDENT BEHAVIOR – Utah Code Ann. § 53A-11-910

6.1 Efforts to Resolve Disruptive Student Behavior Problems

6.1.1 Information About Resources. The School will provide to a parent of a student who engages in disruptive student behavior a list of resources available to assist the parent in resolving the student's disruptive behavior problem.

6.1.2 Procedures for Resolving Problems. The Director or a teacher or counselor designated by the Director will work with students who engage in disruptive student behavior according to the procedures identified in Section 7, below, in an attempt to help the student's behavior to improve and to prevent problems from escalating.

6.2 Notice of Disruptive Student Behavior

6.2.1 Authorization. The Director is authorized to issue notices of disruptive student behavior to students who are qualifying minors.

6.2.2 Criteria for Issuing Notice. The Director will issue a “notice of disruptive student behavior” to a qualifying minor who:

[a] engages in “disruptive student behavior” that does not result in suspension or expulsion three times during the school year; or

[b] engages in disruptive student behavior that results in suspension or expulsion once during the school year.

6.2.3 Contents of Notice. The notice of disruptive student behavior will:

[a] require the qualifying minor and a parent of the qualifying minor to whom the notice is issued to (i) meet with School authorities to discuss the qualifying minor's disruptive student behavior; and (ii) cooperate with the Director and the Board in correcting the student's disruptive student behavior;

[b] contain a statement indicating:

(i) the number of additional times that, if the qualifying minor engages in disruptive student behavior that does not result in suspension or expulsion, will result in the qualifying minor receiving a habitual disruptive student behavior citation; and

(ii) that the qualifying minor will receive a habitual disruptive student behavior citation if the qualifying minor engages in disruptive student behavior that results in suspension or expulsion; and

[c] be mailed by certified mail to, or served in person on, a parent of the qualifying minor.

6.2.4 Contesting Notice. A qualifying minor, or a qualifying minor's parent, may contest a notice of disruptive student behavior by requesting in writing, within ten (10) business days after receipt of the notice, a meeting with the CMT at which the parent and the CMT will discuss the facts related to the student’s behavior, the basis of the parent’s concerns with or objections to the issuance of the notice, and efforts that have been made to address the behavior problems.

6.3 Habitual Disruptive Student Behavior Citation

6.3.1 Criteria for Issuing Notice. The Director may issue a “habitual disruptive student behavior citation” to a qualifying minor who:

[a] engages in disruptive student behavior that does not result in suspension or expulsion at least six times during the school year;

[b] (i) engages in disruptive student behavior that does not result in suspension or expulsion at least three times during the school year; and (ii) engages in disruptive student behavior that results in suspension or expulsion at least once during the school year; or

[c] engages in disruptive student behavior that results in suspension or expulsion at least twice during the school year.

6.3.2 Referral to Juvenile Court. A qualifying minor to whom a habitual disruptive student behavior citation is issued shall be referred to the juvenile court.

6.3.3 Notice to Parents. Within five (5) days after the day on which a habitual disruptive student behavior citation is issued, the Director shall provide documentation to a parent of the qualifying minor who receives the citation of the efforts made by a School representative under Section 7, below.

7. ALTERNATIVES TO EXPULSION, OR CHANGE OR PLACEMENT FOR FREQUENT OR FLAGRANT DISRUPTIVE BEHAVIOR – Utah Code Ann. § 53A-11-906

A continuum of intervention strategies shall be available to help students whose behavior in School repeatedly falls short of reasonable expectations. Prior to suspending a student for more than ten (10) days or expelling a student for repeated acts of willful disobedience, defiance of authority, or disruptive behavior which are not so extreme or violent that immediate removal is warranted, good faith efforts shall be made to implement a remedial discipline plan to allow the student to remain in the School.

7.1 Before referring the student for long-term suspension, expulsion or change of placement under this section, School staff should demonstrate that they have attempted some or all of the following interventions:

7.1.1 Talking with the student;

7.1.2 Class schedule adjustment;

7.1.3 Phone contact with the parent or legal guardian;

7.1.4 Informal parent/student conferences;

7.1.5 Behavioral contracts;

7.1.6 After-school make-up time;

7.1.7 Short-term in-school suspension (ISS);

7.1.8 Short-term at-home suspensions;

7.1.9 Appropriate evaluation;

7.1.10 Home study;

7.1.11 Alternative programs;

7.1.12 Law enforcement assistance as appropriate.

7.2 Parental Attendance with Student – Utah Code Ann. § 53A-11-906(1)-(2).

As part of a remedial discipline plan for a student, the School may require the student's parent or guardian, with the consent of the student's teachers, to attend class with the student for a period of time specified by a designated School official. If the parent or guardian does not agree or fails to attend class with the student, the student shall be suspended in accordance with the provisions of this policy.

8. DUE PROCESS FOR SUSPENSIONS OF TEN (10) DAYS OR LESS

The following procedure shall apply to all students facing suspension of ten (10) school days or less:

8.1 The Director shall notify the student's custodial parent or guardian of the following without delay: that the student has been suspended, the grounds for the suspension, the period of time for which the student is suspended, and the time and place for the parent or guardian to meet with the Director to review the suspension.

8.2 The Director shall also notify the non-custodial parent, if requested in writing, of the suspension.

8.2.1 Section 8.2 does not apply to the portion of School records, which would disclose any information protected under a court order.

8.2.2 The custodial parent is responsible to provide the School a certified copy of any court order under subsection 8.2.1.

8.3 The Director shall document the charges, evidence, and action taken.

8.4 The student shall be requested to present his/her version of the incident in writing. Students with disabilities or young students who are unable to write their own statements shall be accommodated through the use of tape recorder, scribe, etc.

8.5 If the student denies the charges, the student shall be provided with an explanation of the evidence and an opportunity to present his/her version of the incident to the Director.

8.6 In general, the notice and informal conference shall precede the student's removal from the School.

8.7 If, in the judgment of the Director, notice is not possible because the student poses a danger to a person or property or an ongoing threat of disrupting the academic process, he/she may be removed immediately. However, in such cases, the necessary notice and hearing shall follow as soon as possible.

9. DUE PROCESS FOR SUSPENSIONS OF MORE THAN TEN (10) DAYS AND EXPULSIONS

9.1 If the Director believes that a student should be suspended for more than ten (10) days or expelled, the Director may make the initial decision and shall meet with the student's parent or guardian to discuss the charges against the student and the proposed discipline within five (5) school days after the suspension or expulsion began. If requested in writing, the Director shall also notify the non-custodial parent of the suspension or expulsion as outlined in section 8.2 of this policy.

9.2 Notice to Student and Parent/Guardian

During the meeting required in section 9.1, the Director shall provide the student's parent or guardian with written notice that includes all of the following elements (or, if the student's parent or guardian refuses to meet, the Director shall send the notice by certified mail, return receipt requested, to the student's parent or legal guardian within ten (10) school days after the suspension or expulsion began):

9.2.1 a description of the alleged violation(s) or reason(s) giving rise to disciplinary action;

9.2.2 the penalty being imposed (duration of suspension or expulsion);

9.2.3 a statement that a due process hearing may be requested by providing the Director with written notice within ten (10) school days of the parent or guardian's receipt of the notice;

9.2.4 a statement that, if a due process hearing is requested, the Board, even though less than a quorum, will conduct the hearing;

9.2.5 a statement that the suspension or expulsion is taking effect immediately and will continue for the stated period unless a due process hearing is requested in a timely manner and the Board determines otherwise;

9.2.6 the mailing date of the notice;

9.2.7 a statement that, if a hearing is not requested within ten (10) school days after receipt of the notice, the Director's decision to suspend or expel the student will be final, and the parent's right to oppose the decision will be waived.

9.3 Hearing Procedures

If a Due Process Hearing is requested in response to the notice sent pursuant to section 9.2 of this policy, the following procedures shall apply:

9.3.1 After receipt of the request, the School shall schedule a hearing as soon as possible but not later than ten (10) school days following receipt of the request unless the student's parent or guardian agrees otherwise.

9.3.2 A written Hearing Notice shall be sent to the parent or guardian informing the parent or guardian that the Due Process Hearing will be conducted before the Board and of the following information:

[a] the date, place, and time of the hearing;

[b] the circumstances, evidence, and issues to be discussed at the hearing;

[c] the right of all parties to cross-examine witnesses subject to the Board chairman's determination that this right should be limited to protect student witnesses from retaliation, ostracism or reprisal; and

[d] the right of all parties to examine all relevant records.

9.3.3 The Board shall conduct the Due Process Hearing on the record and shall:

[a] ensure that a written record of the Hearing is made, a copy of which shall be provided to all parties upon request, with the cost borne by the School;

[b] consider all relevant evidence presented at the Hearing;

[c] allow the right to cross-examination of witnesses, unless the Board chairman determines that this right should be limited to protect student witnesses from ostracism, retaliation or reprisal;

[d] allow all parties a fair opportunity to present relevant evidence; and

[e] issue a written decision including findings of fact and conclusions.

9.3.4 Hearing Rules

Formal Rules of Evidence do not apply to the Due Process Hearing, and no discovery is permitted. However, the following rules will apply:

[a] parties may have access to information contained in the School's files to the extent permitted by law;

[b] hearings shall be closed to the press and the public;

[c] documents, testimony, or other evidence submitted by the parties after the hearing will not be considered by the Board; and

[d] the Board may excuse witnesses or parties or suspend or terminate a hearing if persons involved in the hearing are abusive, disorderly, disruptive, or if they refuse to abide by the rules and orders of the Board.

10. DUE PROCESS FOR CHANGE OF PLACEMENT OF STUDENTS WITH DISABILITIES

Where the student is receiving special education services or accommodations on the basis of disability under IDEA, 504 or ADA, procedures outlined in the Utah State Board of Education Special Education Rules shall be followed, including prior written notice to parents or guardians regarding their procedural due process rights, before any long-term disciplinary action or change of placement takes place.

10.1 Required Services

10.1.1 504 and ADA Students

When a determination is made that the conduct of a 504 or ADA student (but not a student who is disabled under IDEA) is not a manifestation of the student's disability pursuant to Section 10.5, the student shall be subject to the same disciplinary consequences as regular education students, up to and including expulsion from School without educational services. (See OSEP memorandum of April 26, 1995.)

10.1.2 IDEA

A school need not provide services during periods of removal to a student with a disability under IDEA who has been removed from his or her current placement for ten (10) school days or less in that school year if services are not provided to a student without disabilities who has been similarly removed.

If a student with a disability under IDEA has been removed from his or her current placement for more than ten (10) school days in the same school year, for the remainder of the removals, the School shall provide services to the extent necessary to enable the student to progress in the general curriculum and appropriately advance toward achieving the goals set out in the student's IEP. School personnel, in consultation with the student's special education teacher, determine the extent to which services are necessary to enable the student to appropriately progress in the general curriculum and advance toward achieving the goals set out in the student's IEP.

10.2 Change of Placement for Weapons or Drugs

A student's IEP team may order a change in placement of a student with a disability to an appropriate interim alternative educational setting for the same amount of time that a student without a disability would be subject to discipline, but for not more than forty-five (45) days, if:

10.2.1 The student carries a weapon to School or to a School-sponsored activity; or

10.2.2 The student knowingly possesses or uses illegal drugs or sells or solicits the sale of a controlled substance while at School or a School-sponsored activity.

10.3 Change of Placement Due to Student's Serious Misconduct

School officials may request an expedited due process hearing in order to change the placement of a student with a disability to an appropriate interim alternative educational setting, recommended by the student's IEP team, for not more than forty-five (45) days. A hearing officer may order such a change, if he/she:

10.3.1 Determines that School officials have demonstrated by substantial evidence that maintaining the current placement of a student is substantially likely to result in injury to the student or others;

10.3.2 Considers the appropriateness of the student's current placement;

10.3.3 Considers whether School officials have made reasonable efforts to minimize the risk of harm in the student's current placement, including the use of supplementary aids and services; and

10.3.4 Determines that the interim alternative educational setting being recommended by School officials (1) has been selected so as to enable the student to continue to progress in the general curriculum, although in another setting, and to continue to receive those services and modifications, including those described in the student's current IEP, that will enable the student to meet the goals set out in that IEP: and (2) includes services and modifications designed to address the behavior at issue so that it does not recur.

10.4 Parental Notice

As soon as a decision is made by School officials to remove a student with a disability from his/her current placement for more than ten (10) school days, the student's parents must be notified of that decision and of all procedural safeguards outlined by law and School policy.

10.5 IEP Meetings for Manifestation Determination

10.5.1 Immediately, if possible, but in no case later than ten (10) school days after the date on which the decision is made to remove the student from the current placement, a review must be conducted of the relationship between the student's disability and the behavior subject to the disciplinary action.

10.5.2 The manifestation review must be conducted by the student's IEP team and other qualified School personnel.

10.5.3 In conducting the manifestation review, the IEP team may determine that the behavior of the student was not a manifestation of student's disability only if the IEP team:

[a] First considers, in terms of behavior subject to disciplinary action, all relevant information, including:

(i) Evaluation and diagnostic results, including the results or other relevant information supplied by the parents of the student;

(ii) Observations of the student; and

(iii) The student's IEP and placement; and

[b] Then determines whether:

(i) The conduct in question was caused by or had a direct and substantial relationship to the child's disability; or

(ii) The conduct in question was the direct result of the School's failure to implement the student's IEP.

10.5.4 If the IEP team determines that either of the standards above was met, the behavior must be considered a manifestation of the student's disability.

10.5.5 Determination that Behavior was not Manifestation of Disability

If the result of the manifestation review is a determination that the behavior of a student with a disability was not a manifestation of the student's disability, the relevant disciplinary procedures

applicable to students without disabilities may be applied to the student in the same manner in which they would be applied to students without disabilities, except that a free appropriate public education must still be made available to the student if the student is suspended or expelled from School.

10.5.6 Determination that Behavior was Manifestation of Disability

If the result of the manifestation review is a determination that the behavior of a student with a disability was a manifestation of the student's disability, the student must remain in or be returned to the prior placement.

10.6 IEP Meetings for Functional Behavioral Assessments

10.6.1 Post-Discipline Functional Behavioral Assessments

If School officials have not conducted a functional behavioral assessment and implemented a behavioral intervention plan for the student before the behavior that results in a removal from School for longer than ten (10) school days or a change of placement to an interim alternative educational setting, School officials shall convene an IEP meeting to develop an assessment plan and appropriate behavioral interventions to address that behavior.

10.6.2 Pre-Discipline Behavioral Intervention Plans

If the student already has a behavioral intervention plan, the IEP team shall review the plan and modify it, as necessary, to address the behavior.

10.7 Placement During Appeals and Stay Put

10.7.1 If a parent requests a due process hearing to challenge the interim alternative educational setting or the manifestation determination, the student must remain subject to the disciplinary action pending the decision of the hearing officer or until the expiration of the forty-five (45) day period, whichever occurs first, unless the parent and School officials agree otherwise.

10.7.2 If a student is placed in an interim alternative educational setting and School personnel propose to change the student's placement after expiration of the interim alternative placement, during the pendency of any proceeding to challenge the proposed

change in placement the student must remain in the current placement (the student's placement prior to the interim alternative education setting), unless School officials succeed in getting an order through an expedited hearing as described in Section 10.3.

11. SITE-BASED SAFE SCHOOLS MEASURES

11.1 Closed Campus

The School has a "closed campus" policy, under which students are prohibited from leaving School grounds during the school day without authorization from the School's office.

11.2 Physical Restraint

A School employee may, when acting within the scope of employment, use and apply physical restraint or force as may be reasonable and necessary under the following circumstances:

11.2.1 To protect any person from physical injury;

11.2.2 To take possession of a weapon, other dangerous objects or controlled substances in the possession of a student;

11.2.3 To restrain or remove a student from a situation when that student is violent or disruptive, or is a danger to him/herself or others, or

11.2.4 To protect property from serious damage.

11.2.5 When an employee exercises physical restraint on a student, the employee shall write a report outlining the incident and the reasons for the use of physical restraint within three (3) days following the incident. This report shall be filed with the Director, who then is responsible for sending a copy of the report to the Board. The original of the report shall be kept in the employee's file.

11.3 Corporal Punishment

School employees may not inflict or cause the infliction of corporal punishment upon a student.

11.4 After-School Detention

11.4.1 Teachers and other School officials shall make reasonable attempts to notify a parent or legal guardian before detaining a student after School.

11.4.2 If detention is necessary for the student's health or safety, an exception may be made to the notice requirement.

12. EXTRA-CURRICULAR ACTIVITIES

Participation in interscholastic athletics and other extra-curricular activities is not a constitutionally protected civil right. Therefore, students who are suspended or expelled may lose the privilege of participation during the period of suspension/expulsion and may not be allowed to invoke due process procedures to challenge the denial of extra-curricular participation.

13. RE-ADMISSION OF EXPELLED STUDENTS AND DENIAL OF ADMISSION BASED ON PRIOR EXPULSION – Utah Code Ann. §53A-11-904(3)

A student who is expelled from the School can only be re-admitted to the School through the School's standard lottery procedures.

A student may be denied admission to the School if he or she was expelled from the School or any other school during the preceding 12 months.

14. INVESTIGATIONS

Whenever the Director has reason to believe that School rules or policies have been broken, he or she shall proceed with an investigation. However, if the Director believes that laws have been broken or child abuse has occurred, he/she shall request appropriate authorities to conduct the investigation.

14.1 General Investigation Guidelines for Director

The Director has the authority and duty to conduct investigations and to question students pertaining to infractions of school rules, whether or not the alleged conduct is a violation of criminal law. The Director shall conduct investigations according to the following general guidelines:

14.1.1 The Director shall conduct investigations in a way that does not unduly interfere with School activities.

14.1.2 The Director shall separate witnesses and offenders in an attempt to keep witnesses from collaborating their statements and have all parties provide separate statements concerning the incident under investigation; written statements are preferable, if possible.

14.1.3 The Director shall advise students suspected of wrongdoing orally or in writing of the nature of the alleged offense.

14.1.4 Students must be provided an opportunity to give their version of the incident under investigation; however, refusals to respond or provide information should be respected.

14.1.5 When questioning students as part of an investigation, School staff should have another adult present whenever possible.

14.1.6 The Director shall accommodate students with disabilities and young children unable to write their own statements through use of tape recorders, scribes, etc.

14.1.7 All students involved in the investigation shall be instructed that retaliation is prohibited. Any act of reprisal against any person who has testified, assisted, or participated in any manner in an investigation, proceeding, or hearing is strictly prohibited and subject to disciplinary action.

14.1.8 When the investigation is completed and if it is determined that disciplinary action may be in order, due process requirements must be met. Specifically, the student must

be given proper notice of the charges against him/her and the disciplinary action being recommended, as well as a fair opportunity to present his or her version of the facts.

14.2 Coordination with Law Enforcement

The Director has the responsibility and the authority to determine when the help of law enforcement officers is necessary, as outlined in this policy and Utah State law.

14.2.1 The School administration may invite law enforcement officials to the School to:

[a]conduct an investigation of alleged criminal conduct on the School premises or during a School-sponsored activity;

[b]maintain a safe and orderly educational environment; or

[c]maintain or restore order when the presence of such officers is necessary to prevent injury to persons or property.

14.2.2 Investigation of Criminal Conduct

During an investigation for violation of School rules, it may become evident that the incident under investigation may also be a violation of criminal law. If the School official has reason to suspect that a criminal act has been committed and, in the opinion of the Director, law enforcement should be notified, the following procedure should be followed:

[a]The Director shall request that law enforcement officers conduct an investigation during school hours and question students who are potential witnesses to the alleged criminal behavior.

[b]The School official shall inform the student's parent or legal guardian as soon as possible that the student may have committed a criminal act and that law enforcement authorities will be involved in the investigation.

[c]Unless circumstances dictate otherwise, questioning of the student by School officials shall not begin or continue until the law enforcement officers arrive.

[d] Reasonable attempts shall be made to contact the student's parents or legal guardian who, unless an emergency exists, shall be given the opportunity to meet with the student and to be present with the student during questioning by law enforcement authorities.

[e] The Director shall document the contact or attempted contact with the student's parents or legal guardian. If the Director cannot contact the student's parent or guardian, or if the parent or guardian is unable to be present with the student for questioning, the Director shall be present and document generally what occurs during the interview.

[f] The student shall not be questioned by law enforcement unless or until he/she has received Miranda warnings from the officer.

[g] If the parent or student refuses to consent to questioning by law enforcement authorities, the law enforcement authorities shall determine the course of action to be pursued.

14.2.3 Investigation Initiated by Law Enforcement Authorities

School officials shall cooperate with law enforcement authorities who are carrying out official duties such as investigating crimes, serving subpoenas, etc.

[a] When law enforcement officers can show a need to do so, they shall be permitted to conduct an investigation on School grounds during School hours.

[b] Such a need will ordinarily be shown if delay in police investigation might result in danger to a person, flight from jurisdiction by a person reasonably suspected of a crime, or destruction of evidence. In such cases:

(i) The officers shall be required to get prior approval of the Director or other designated person before beginning an investigation on School premises.

(ii) The Director shall document the circumstances warranting the investigation as soon as practical.

(iii) Alleged criminal behavior related to the School environment brought to the Director's attention by law enforcement officers shall be dealt with under the provisions of Section 14.1.

(iv) Law enforcement officials (investigating School-related or student-related crimes) may not have access to student education records, aside from directory information, unless they have a subpoena or court order or permission from parent or guardian.

(v) Directory information is limited to a student's name, home address, date of birth, phone number, class schedules and parents' address and phone numbers for use in case of emergency.

14.2.4 Release of Student to Law Enforcement Official

[a] Students may not be released to law enforcement authorities voluntarily by School officials unless the student has been placed under arrest or unless the parent or legal guardian and the student agree to the release.

[b] When students are removed from School for any reason by law enforcement authorities, every reasonable effort shall be made to contact the student's parent or legal guardian immediately except in cases of child abuse and neglect. Such effort shall be documented.

[c] The Director shall immediately notify the Board of the removal of a student from School by law enforcement authorities.

[d] Where it is necessary to take a student into custody on School premises, the law enforcement officer shall contact the Director and relate the circumstances necessitating such action.

[e] Whenever the need arises to make arrests or take students into custody on School premises, the Director shall make reasonable efforts to consult and confer with the law enforcement officers as to how an arrest is to be made.

[f] When possible, the Director shall have the student summoned to the Director's office before the student is taken into custody.

[g] When a student has been taken into custody or arrested on School premises without prior notification to the Director, the School staff present shall encourage the law enforcement officers to tell the Director of the circumstances as quickly as possible. If the officers decline to tell the Director, the School staff members present shall immediately notify the Director.

14.2.5 Quelling Disturbances of School Environment

Law enforcement officers may be requested to assist in controlling disturbances of the School environment that a Director has found to be unmanageable by School personnel and that has the potential of causing harm to students and other persons or to property. Such circumstances include situations where a parent or member of the public exhibits undesirable or illegal conduct on or near School grounds or at a School-sponsored activity and who refuse to abide by a Director's directive to leave the premises.

15. INVESTIGATION OF CHILD ABUSE AND NEGLECT

Utah law requires that whenever any person, including any School employee, has reason to believe that a child has been subjected to incest, molestation, sexual exploitation, sexual abuse, physical abuse, or neglect, or observes a child being subjected to conditions or circumstances

which would reasonably result in such, he/she shall immediately notify the nearest peace officer, law enforcement agency, or office of the Division of Child and Family Services.

15.1 The School shall distribute annually to all School employees copies of the School's procedures for reporting suspected child abuse or neglect.

15.2 If there is reason to believe that a child may have been subjected to abuse or neglect, an oral report shall be made immediately by the School employee reporting the abuse/neglect with a written report to follow within twenty-four (24) hours.

15.2.1 When making the oral report, always have the person you notify identify himself/herself. The notified person's name shall be entered on the written report.

15.2.2 A copy of the written report shall be put in a child abuse-neglect file to be maintained by the Director, for all reported cases of suspected child abuse or neglect.

15.2.3 The child abuse-neglect reporting form shall not be placed in the student's personal file.

15.3 It is not the responsibility of the Director or other School employees to prove that the child has been abused or neglected, or to determine whether the child is in need of protection.

15.3.1 Investigation by staff prior to submitting a report shall not go beyond that necessary to support a reasonable belief that a reportable problem exists.

15.3.2 To determine whether or not there is reason to believe that abuse or neglect has occurred, professional School employees may (but are not required to) gather information only to the extent necessary to determine whether a reportable circumstance exists.

15.3.3 Interviews with the child or suspected abuser shall not be conducted by the Director or School employees.

15.3.4 Notes of voluntary or spontaneous statements by the child shall be made and given to the investigating agency.

15.3.5 The Director, School employees, Division of Child and Family Services and law enforcement personnel are required to preserve the anonymity of those making the initial report and any others involved in the subsequent investigation.

15.3.6 Investigations are the responsibility of the Division of Child and Family Services.

[a] The Director or other School employees shall not contact the parents, relatives, friends, neighbors, etc. for the purpose of determining the cause of the injury and/or apparent neglect.

[b] School officials shall cooperate with social service and law enforcement agency employees authorized to investigate reports of alleged child abuse and neglect, assisting as asked as members of interdisciplinary child protection teams in providing protective diagnostic, assessment, treatment, and coordination services.

15.3.7 Persons making reports or participating in good faith in an investigation of alleged child abuse or neglect are immune, in accordance with state law, from any civil or criminal liability that otherwise might arise from those actions.

16. SEARCHES OF PERSON OR PROPERTY

Given the School's custodial and tutelary responsibility for children, and the Board's intent to preserve a safe environment for all students and staff, the Board recognizes that School officials must have the authority to conduct reasonable searches of students and student property. School officials engaging in searches of students and property shall abide by the following guidelines:

16.1 General Guidelines for Searches of Person or Property

16.1.1 Student Lockers

Students have no right or expectation of privacy in school lockers. While lockers are under the joint control of students and the School, lockers are solely School property and may be searched at any time by School officials with or without cause. Once a locker is opened for search, any search of student belongings contained within the locker must comply with the guidelines for searches of personal belongings in Section 15.2 of this policy.

16.1.2 Searches of Students and Student Property

Searches of a student's person, personal property (coats, hats, backpacks, book bags, purses, wallets, notebooks, gym bags, etc.) may be conducted whenever the student's conduct creates a reasonable suspicion that a particular School rule or law has been violated and that the search is reasonably related to the suspicion and not excessively intrusive in light of the age and sex of the student and nature of the infraction. Circumstances warranting a search include those in which School officials have a reasonable suspicion that the student or student property is concealing items including but not limited to weapons, drugs, alcohol, tobacco, unsafe contraband, pornography, pagers or lost/stolen/misplaced items.

16.2 Searches of Personal Belongings

16.2.1 Personal belongings may be searched by School officials whenever School

officials have a reasonable suspicion to believe a student is concealing evidence of a policy violation or criminal activity and the items being searched are capable of concealing such

evidence. The student may be asked to open personal belongings and to turn over personal property for search by a School official. All searches of student property by School officials shall be witnessed by an objective third party (such as another teacher, or police officer) to observe that the search is not excessively intrusive.

16.2.2 All contraband discovered in a search by School officials shall be immediately confiscated and turned over to law enforcement officers if School officials have reason to believe the contraband is related to the commission of a criminal act.

16.3 Searches of Person

16.3.1 School officials shall make sure the search meets the following guidelines:

[a] The search shall be conducted in a private area of the School by a School official of the same sex as the student being searched;

[b] The search shall be observed by an objective third party of the same sex as the student being searched (i.e., Director, teacher, police officer);

[c] School officials may ask the student to remove his/her hat, coat, shoes and socks, turn pockets inside out, and roll up sleeves to see if the student is hiding contraband;

[d] Under no circumstances may School officials require students to remove any other items of clothing or touch students in any way during the search.

[e] If this limited search does not turn up suspected contraband and School officials have reasonable suspicion that the student is concealing contraband in his/her inner clothing (i.e., hiding drugs, weapons or other contraband underneath shirts, pants or underwear), law enforcement officers shall be summoned immediately to conduct further search and investigation.

[f] In general, all questioning and searching of students conducted by law enforcement officers shall proceed according to the investigation guidelines in Section 14 of this policy.

[g] 16.4 Documentation of Searches

School officials shall thoroughly document the details of any search conducted of a student's property or person. Documentation shall be made at the time of the search, or as soon as possible thereafter, and shall include the following:

16.4.1 The time, place and date of the search;

16.4.2 The reasonable suspicion giving rise to the search (what did School officials suspect to find during the search);

- 16.4.3** The name and title of individuals conducting and observing the search;
- 16.4.4** A statement about evidence that was found or not found as a result of the search;
- 16.4.5** A statement about who took possession of contraband (i.e., police, school, etc.);
- 16.4.6** Information regarding the attempts of School officials to notify parents about the search.

**17. RECORDS—INTERAGENCY COLLABORATION – 20 U.S.C. § 1232g(h)(i)-(2);
Utah Code Ann. § 53A-11-1001-1004**

17.1 Board and Director Notification by Juvenile Court and Law Enforcement Agencies.

17.1.1 Within three (3) days of being notified by the juvenile court that a juvenile has been adjudicated or of being notified by a law enforcement agency that a juvenile has been taken into custody or detention for a violent felony, defined in Utah Code Ann. § 76-3-203.5, or an offense in violation of Title 76, Chapter 10, Part 5 Weapons, the President of the Board shall notify the Director.

17.1.2 Upon receipt of the information, the Director shall make a notation in a secure file other than the student's permanent file; and, if the student is still enrolled in the School, the Director shall notify staff members who should know of the adjudication, arrest or detention.

17.1.3 Staff members receiving information about a juvenile's adjudication, arrest or detention may only disclose the information to other persons having both a right and a current need to know.

17.2 Student Discipline Records/Education Records

School officials may include appropriate information in the education record of any student concerning disciplinary action taken against the student for conduct that posed a significant risk to the safety or well-being of that student, other students, or other members of the school community.

17.2.1 Disclosure of Discipline Records to Other Educators

School officials may disclose student discipline information described above to teachers and other School officials, including teachers and school officials in other schools, who have legitimate educational interests in the behavior of the student.

17.2.2 Disclosure of Discipline Records to Other Agencies

School officials shall not release personally identifiable student discipline records to other government agencies, including law enforcement agencies, unless the agency produces a

subpoena or court order (need for standing court order from juvenile court), or unless the student's parent or guardian has authorized disclosure.

18. TRAINING

18.1 All new employees shall receive information about this policy at new employee orientation. All other employees shall be provided information on a regular basis regarding this policy and the School's commitment to a safe and orderly school environment.

18.2 Employees who have specific responsibilities for investigating and resolving safe schools violations shall receive yearly training on this policy and related legal developments.

18.3 The Director shall be responsible for informing students, parents, and staff of the terms of this policy including the procedures outlined for investigation and resolution of violations.

19. POLICY DISSEMINATION AND REVIEW

19.1 The School shall compile an annual report of all out-of-school suspensions and expulsions and submit it to the Board. For each suspension or expulsion, the report shall indicate the student's race, gender, disability status, and age/grade, as well as the reason for the discipline, the length of the discipline, and a statement as to whether the student was referred to the Board.

19.2 A summary of this policy shall be posted in the School, and the policy will be posted on the School's website. The policy or a summary of the policy shall also be published in student registration materials, student and employee handbooks, and other appropriate school publications as directed by the Board.

19.3 This policy shall be reviewed as necessary with appropriate revisions recommended to the Board.

Appendix E

Complaint Policy

Proposed Parent Complaint Policy

Purpose

The purpose of this policy is to clarify for parents a process by which concerns can be addressed. The Governing Board of Directors of Mountain West Montessori Academy (the “School”) embraces the Montessori values of grace, courtesy, respect and responsibility and therefore values open communication between parents, faculty, staff, administration, and the Board. The Governing Board of Directors encourages active parent participation in their children’s education, and hopes that parents will feel empowered to voice their opinions, volunteer in and out of the classroom for the School, and work as a team to provide the best education for their children. The Governing Board of Directors also believes that individuals can generally resolve their own disputes through open, respectful communication. If a situation arises that cannot be resolved between the parties involved, then this policy will be used. The purpose of this policy is to ensure that parents understand how to pursue the resolution of grievances, concerns and disputes involving the School.

Concerns Involving School Personnel

A parent who has a complaint involving a teacher, staff member or member of the School’s administration (including the Director) must first address the issue with the other individual involved and work reasonably and in good faith to resolve the concern. The parent should raise this concern with the individual within ten (10) days of when the issue arises.

A parent that is not able to resolve the dispute himself or herself may then raise the issue with the School’s Director. The parent should first send to the Director a written complaint specifying the individual(s) involved, details of the incident(s) giving rise to the complaint, including dates and approximate times, details of an attempt to rectify the situation, and the requested solution. The parent and the Director should schedule a time within ten (10) days of the Director’s receipt of the complaint to discuss the concern in person or via telephone.

If a parent’s complaint involves the Director, the parent must first address the issue with the Director and work reasonably and in good faith to resolve the problem. The parent is not required to send the Director a written complaint in this situation. The parent and the Director should schedule a time within ten (10) days to discuss the concern in person or via telephone.

In the event the parent and the Director are unable to resolve a complaint and the parent wishes to bring the issue to the Board’s attention, the complaint may be directed to the Governing Board

of Directors in writing. The Board retains discretion in determining whether the complaint rises to a level requiring Board involvement. Complaints shall specify the individual(s) involved, details of the incident(s) giving rise to the complaint, including dates and approximate times, details of attempts to resolve the problem, and the requested solution.

Concerns Involving Board Policy

If a parent has a concern regarding Board policy, the parent may communicate with any or all members of the Governing Board of Directors in person, via telephone, or through e-mail and may address the Board during the “public comment” portion of a Board of Directors meeting. Parents may also request to be added to the Board meeting agenda by contacting the President of the Governing Board of Directors at least three (3) working days prior to the scheduled meeting date. However, the Board President has discretion over the Board meeting agenda items and may elect not to place the item on the agenda.

Concerns that involve administrative practices or procedures should be addressed with the Director rather than the Governing Board of Directors.

Proposed Staff Complaint Policy

Purpose

The Governing Board of Directors (“Board”) of Mountain West Montessori Academy (the “School”) embraces the Montessori values of grace, courtesy, respect and responsibility and therefore values open communication between faculty, staff, administration, and the Board. The Board also believes that individuals can generally resolve their own disputes through open, respectful communication. If a situation arises that cannot be resolved between the parties involved, then this policy will be used. The purpose of this policy is to ensure that staff members understand how to pursue the resolution of grievances, concerns and disputes involving other School employees.

The Board wishes to emphasize that the School is an at-will employer, and this policy is not intended to modify the at-will employment relationship between the School and its employees.

Policy

A staff member who has a complaint regarding another staff member must first address the issue with the other employee involved and work reasonably and in good faith to resolve the concern.

A staff member that is not able to resolve the dispute himself or herself may then raise the issue with the School’s Director.

If a staff member's complaint involves the Director, the staff member must first address the issue with the Director and work reasonably and in good faith to resolve the problem.

A staff member should not direct complaints to the Board unless and until he or she has worked in good faith to resolve the issues with the other individual and with the School's Director.

In the event the staff member and the Director are unable to resolve a complaint and the staff member wishes to bring the issue to the Board's attention, the complaint may be directed to the Board in writing. Complaints shall specify the individual(s) involved, details of the incident(s) giving rise to the complaint, including dates and approximate times, details of attempts to resolve the problem, and the requested solution. The Board will then consider the complaint and take whatever action it deems appropriate.

This policy does not confer upon any employee of the School any additional rights. Accordingly, the existence of this policy does not preclude the School from terminating any employee for any lawful reason even if the employee is pursuing the resolution of a grievance.

Additionally, this policy is not intended to discourage an employee from reporting to the appropriate individual(s) a legal violation committed by another employee and does not limit a School employee's right to appropriately report a legal violation committed by another employee.

Proposed Individuals with Disabilities Education Act ("IDEA") Complaint Policy

Mountain West Montessori Academy will follow the dispute resolution procedures adopted by USOE as written in the State's Special Education Rules (August, 2007). This includes Problem Solving Facilitation, Formal State Complaints, Mediation, and Due Process Hearings. The following is a brief summary of the requirements of these procedures. These procedures are not sequential. However, Problem Solving Facilitation cannot proceed if a Formal Complaint, Mediation, or Due Process Hearing request is filed. A Formal Complaint cannot proceed if a Due Process Hearing request is filed.

Problem Solving Facilitation

This method of early dispute resolution is available at any time, before a State Complaint, Mediation, or Due Process Hearing request is filed as long as both Mountain West Montessori Academy and the party filling the complaint, typically the parent, agree. The issue(s) of disagreement must be specified and how they violate IDEA described. USOE is responsible for assigning a facilitator in order to keep the communication open to resolve concerns with no time line for resolution stipulated.

Formal State Complaint

The complaint must be filed, in writing, to the school's Director and at the same time it must be provided to the State's Special Education Director. The written complaint must describe the alleged violations of IDEA with respect to the individual student and the proposed solutions to the problems. The school will have 30 days to conduct an investigation and write a decision. If in disagreement with the findings, the parent has ten (10) days to appeal the school's decision and USOE will conduct an independent investigation before a total of 60 days.

Mediation

Mediation is available at any time during the IDEA process and may be requested by either the school or the parent. Both parties must agree to mediate or mediation will not occur. The alleged violation should be filed with the school's Director as well as copied to the State's Special Education Director. The complaint must describe the problem, the alleged violations of IDEA with respect to the individual student, and the proposed solutions to the problems. USOE is responsible for assigning a mediator and will absorb costs of the mediation sessions. During mediation session, information discussed is confidential and the mediation agreement is binding and enforceable court law. There is no timeline for resolution in the mediation procedure.

Due Process Hearing

The complaint must be filed with the school's Director and copied to the State's Special Education Director. The complaint must describe the alleged violations of IDEA with respect to individual student and the proposed solutions to the alleged violations problems. A mandatory resolution session will be initiated within 15 days and if a resolution is possible, a resolution will be completed within 30 days. If a resolution is not possible the hearing will be completed within 45 days after the resolution session time is completed. The Due Process Hearing is like court, making lawyers advisable for both parties, and the Hearing Officer's decision is binding upon both the school and the parent.

Appendix F
Employment of Relatives Policy

Proposed Conflict of Interest Policy

Purpose

The purpose of this Conflict of Interest Policy is to protect Mountain West Montessori Academy (the “School”) when it contemplates any transaction or arrangement that could benefit the private interest of an officer or Board Member of the School. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit or charitable organizations or charter schools organized and operating in the State of Utah.

Compensation

A Board Member shall not have any direct or indirect pecuniary interest in a contract or other arrangement with the School. A Board Member shall not furnish directly and for compensation any labor, equipment, or supplies to the School.

Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of a pecuniary or financial interest in any contract or other arrangement with the School. An “interested person” is any Board Member who has a direct or indirect financial interest in a contract or other arrangement with the School. A person has a financial interest if the person has, directly or indirectly, through business, investment, or family: (i) an ownership or investment interest in any entity with which the School has a transaction or arrangement; (ii) a compensation arrangement with the School or with any entity or individual with which the School has a transaction or arrangement, or; (iii) a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the School is negotiating a transaction or arrangement. Compensation includes direct or indirect remuneration as well as gifts or favors that are not insubstantial. "Family" includes a spouse, child, sibling, parent, stepchild, stepparent, as well as mother-, father-, son-, daughter-, brother-, or sister-in-law.

Conflict of Interest Determination

After disclosure of the financial interest to the Governing Board of Directors and discussion of all material facts, the interested person shall leave the meeting while the Governing Board of Directors discusses the situation and determines whether a conflict of interest exists. The interested person must abstain from voting on the issue.

The meeting minutes shall contain the names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, the names of all Board Member present at the meeting, and a record of any action taken by the Governing Board of Directors.

Appendix G

Acceptable Use and Social Media Policy

Proposed Student Acceptable Use Policy

1. Introduction to the Parent or Legal Guardian

Electronic information resources are available to qualifying students in Mountain West Montessori Academy (the “School”). These resources include the use of the computer and related software and hardware and access to the Local Area Network and the Internet. Our school goal in providing electronic services to students is to promote educational excellence by facilitating resource use, innovation, communication and acceptable use.

Access to computers allows communication with people all over the world. Along with this access comes the availability of materials that may be considered to be inappropriate, unacceptable or possibly illegal or of no educational value in the school setting. The School has initiated safeguards to restrict access to inappropriate materials. Student use of the Internet is monitored. Students who abuse acceptable use, which includes, but is not limited to: violating copyrights; bullying, hazing, intimidation, harassment and threats; accessing pornography or other obscene material; inappropriate language; gambling; unauthorized games; or other unauthorized or inappropriate use, will be subject to discipline.

To qualify for electronic information resource services, students must be willing to abide by the rules of acceptable use. Please work with us in helping your child understand and abide by these simple but important rules of appropriate use. Thank you.

2. For the Student – Acceptable Use

Acceptable use means that as a student in the School you promise to use the School’s computers and special learning tools and programs, such as the Internet, with respect. Acceptable use means you promise to abide by the School’s rules as outlined here and rules that are taught to you by your teachers and computer specialists in School. The use of these electronic teaching and learning tools are designed to support your education.

The use of electronic information resources is a privilege, not a right. Inappropriate use of these resources may result in disciplinary action (including the possibility of suspension or expulsion), and/or referral to legal authorities. The Director, teacher/supervisor or systems administrator may limit, suspend or revoke students’ use of computers or the Internet. If rules are broken, a student may lose his/her privilege of using the computer and the Internet. Please pay special attention to the following:

3. Be Polite and Show Respect: When using the computer to write, send or receive messages or information, always use kind and proper language and abide by the rules of friendliness. Treat others with respect. Refrain from bullying, threats, intimidation, harassment, and similar abusive conduct. Do not use inappropriate language. Do not send, receive or view inappropriate material, including obscene material, pornography, and material relating to weapons, explosive devices, criminal activities, acts of terrorism, racism, gambling, or other illegal activities. You may be alone in your use of the computer, but what you write or receive, using electronic machines, may be viewed by others with or without your knowledge. Parents or legal guardians may gain access to their student's e-mail upon request. Treat the School's equipment with respect. You must not vandalize or abuse the equipment. Do not download or create materials, such as computer viruses, that may damage the system. Do not intentionally overload the system. Show respect for property, others, and self. The computer and electronic resources belong to the School.
4. Be Honest and Obey the Rules: Do not do things that would be against the rules, the law, or may be looked upon as dishonest. Use the computer and the Internet for appropriate educational purposes only. Stay away from inappropriate materials on the Internet. If you have questions about whether or not something is educational or if you accidentally come across inappropriate material, contact your teacher.
5. Keep Personal Things Private: Students should not tell or show others any personal or family information over the Internet, such as: home address, phone numbers, passwords, personal photos when used with names, birthdays, or Social Security Numbers. Do not log on or use another person's account. Keep personal and electronic information private. Do not share your passwords with others.

My Promise to Follow the Rules:

My parent or guardian has reviewed the School's Acceptable Use Agreement with me. I understand the importance of being polite, respectful and honest, and the need to obey the rules for the use of the computer and the Internet. I also know I should not give our personal information about my family or myself over the Internet. I understand that the computer, the Internet and other electronic information resources are to be used for educational purposes only. I also understand that if I break the rules, my use of these educational tools may be taken away from me and that other disciplinary or legal action may be taken. I promise to follow the rules.

Student Name (please print): _____

Student Signature: _____ Date: _____

For the Parent or Legal Guardian:

As the parent or legal guardian, I have read and I have reviewed with my child the School's Acceptable Use Agreement. I understand that the use of these electronic information resources is for educational purposes. I recognize the School has initiated reasonable safeguards to filter and monitor inappropriate materials. I understand that while the School has also taken steps to restrict student access on the Internet to inappropriate information and sites, it is impossible to restrict access to all controversial materials. I further recognize that if my child does not abide by the rules of acceptable use, he/she may be disciplined. I will not hold the School responsible for materials my child may acquire on the Internet. I hereby give permission to the School to permit my child to have access to the Local and Wide Area Networks and the Internet.

Parent or Legal Guardian (please print): _____

Address: _____ City: _____ Zip: _____

Telephone: _____ E-Mail: _____

Signature: _____ Date: _____

Proposed Employee Acceptable Use Policy

Purpose

Mountain West Montessori Academy (the "School") recognizes the value of computer and other electronic resources to improve student learning and enhance the effectiveness of the School's administration and operation. To this end, the School has invested substantial fiscal resources in order to establish a network and provide computers and other electronic resources for its employees' use in fulfilling their responsibilities. School's Governing Board of Directors (the "Board") encourages the responsible use of computers; computer networks, including e-mail and the Internet; and other electronic resources to promote and achieve the School's mission and goals.

Because the Internet is an unregulated, worldwide vehicle for communication, information available to staff and students is difficult to control. Additionally, improper use of the School's electronic resources by employees has the potential to damage the School's image and to impair its electronic resources, thereby causing financial harm to the School. Therefore, the Board adopts this policy governing employees' use of electronic resources and requires employees to agree to these terms in order to establish standards and provide guidance to employees. Employees shall not engage in any activity that does not conform to this policy and any additional guidance established by the Board and/or the Director from time to time.

Policy

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 ethical and responsible conduct in all network activities by staff and students. The School recognizes its legal and moral obligation to protect the well-being of students in its charge and to preserve the integrity of its electronic resources. To this end, the School retains the following rights:

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 of user's 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. To delete or remove, with or without notice, any files, programs, data or other materials from any of the School's electronic resources.
9. To 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 equipment, or otherwise have occasion to observe student use of said equipment online shall make reasonable efforts to monitor the use to assure that it conforms to the mission and goals of the School and to any acceptable use policy governing students' use of electronic resources. Staff should make reasonable efforts to become familiar with the Internet and its use so that effective monitoring, instruction, and assistance may be provided.

User Responsibilities

Use of the computers and other electronic resources provided by the School is a privilege that offers a wealth of information and resources to assist employees in fulfilling their responsibilities and promoting the School's mission and vision. In order to maintain this privilege, users must agree to comply with all of the provisions of this policy. Users aware of any violation of this policy by any employee should report the violation to the Director. *Violation of these policies is grounds for discipline, up to and including termination.*

Acceptable Use

1. All use of the School's computers and electronic resources, including but not limited to e-mail, network and Internet access, whether inside or outside the School, must be in support of educational, research or professional development objectives 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 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 scan all downloaded files with virus detection software before opening.
7. Users must exhibit exemplary behavior when using the School's electronic resources in order to professionally represent and preserve the image the School.
8. Users must use proper precautions to protect computer equipment and other electronic resources in order to reduce repair costs, maintain the integrity of the network, and protect the School's assets.
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

1. Excessive use of the School's electronic resources, including but not limited to the use of laptop computers inside or outside the School, for personal matters is prohibited.
2. Any use of the network for commercial or for-profit purposes is prohibited.
3. Any use of the network for product advertisement or political lobbying is prohibited.
4. Attaching personal equipment to the School's network is prohibited.
5. Users shall not intentionally seek information on, obtain copies of, or modify files, other data, or passwords belonging to other users, or impersonate or misrepresent other users of the School's network.
6. No use of the network shall serve to disrupt the use of the network by others.
7. The School's electronic resources may not be destroyed, modified, or abused in any way.
8. Use of electronic resources in a manner that threatens or impairs the integrity or security of the network is prohibited.

9. Use of the network for hate mail, chain letters, harassment, discriminatory remarks, and other antisocial behaviors is prohibited.
10. Downloading or installation of any software, including shareware and freeware, for use on School computers is prohibited without the approval of the Director or network administrator.
11. Use of any software in violation of the applicable license or use agreement is prohibited.
12. Use of the network to access, process, send or receive pornographic, sexually explicit or otherwise inappropriate material (as determined by the School Director) is prohibited.
13. The School's electronic resources may not be used for downloading entertainment software, files or other material not related to the mission and objectives 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.
14. Downloading, copying, otherwise duplicating, and/or distributing copyrighted materials without the specific written permission of the copyright owner is prohibited, 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 (Title 17, U.S.C.).
15. Use of electronic resources for any unlawful purpose is prohibited.
16. Use of the School's electronic resources to access, process, send or receive materials containing profanity, obscenity, racist terms, or other harassing, abusive, intimidating, threatening, discriminatory or otherwise offensive language or images is prohibited.
17. Use of electronic resources for playing games is prohibited unless it is for instructional purposes or otherwise approved by the School Director.
18. 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.
19. Permitting or granting access to the network, 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, is prohibited.
20. Using portable data storage devices to transport files, programs or data between the School's computers or network and the user's personal computers is prohibited.
21. Establishing connections to live communications, including text, voice or video, is prohibited unless specifically authorized by the network administrator.
22. Malicious use of the network 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 is prohibited.
23. The provisions of the School's Social Networking Policy also apply.

Disclaimer

1. The School cannot be held accountable for the 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:
 - o 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;
 - o 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 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 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.

Acknowledgement of Receipt and Understanding

I hereby certify that I have read and fully understand the contents of this policy. Furthermore, I have been given the opportunity to discuss any information contained herein 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: _____

Proposed Social Networking Policy

Policy

The Mountain West Montessori Academy (the “School”) recognizes both the educational value and dangers of social networking sites. To protect School personnel, students, parents, and School resources, the School requires all educators who access social networking sites to abide by the provisions of this policy.

Definitions

For purposes of this policy, “web page” means a social networking site, personal web site, blog or other Internet location that can be edited by an individual with the correct username and password.

Instructional Use

Web pages may only be accessed at School or using School resources for instructional purposes directly related to the educator’s curriculum.

Prior to creating or using a web page for instructional purposes, an educator must obtain written consent from the School Director. The consent must include the purpose of the access, the names of students permitted to access the site, and the anticipated duration of the instructional activity. The Director may withdraw consent at any time.

An instructional use web page shall comply with all School policies, including the student Code of Conduct. Profane, obscene, defamatory or otherwise inappropriate comments are not permitted.

Educator web page postings may not violate any state or federal laws. Accordingly, educators must comply with the federal Family Educational Rights and Privacy Act and may not post student photos or personally identifiable information without prior written parental consent.

Educators are responsible for ensuring that student posts that violate laws or School policies are removed immediately and that students are referred to the Director for appropriate disciplinary action. Educators are responsible for all content on the educator’s web page, including posts by students.

Access to instructional web pages must be limited to those students whose parent or legal guardian has given written permission for the student to participate on and use the web page. School administrators must be granted access to the web page and shall monitor the site for compliance with this policy.

Educators must include a disclaimer on their web page noting that the content, views, or opinions expressed on the web page do not represent the School and that the educator is solely responsible for any opinions, views, or content on the web page.

Personal Use

School employees who maintain a personal web page shall not allow students to access their personal web page.

School employees shall not solicit students as friends on their personal web pages or invite or encourage students to read or access their web pages.

School employees may not access personal web pages using school resources or during work time.

School employees may face disciplinary action for posts on their personal web pages that violate School policies or state rules regarding professional conduct and create a disruption in the school or interfere with the employee's ability to serve effectively at the School.

School employees may not use School logos, mascots, symbols, or trademarks on their personal web pages.

School employees who use School resources to create, maintain, or post to personal web pages or the pages of others have no expectation of privacy, and their activities may be subject to review by administrators.

School employees who violate this policy will be subject to discipline.

Appendix H
Extra-Curricular Activities Policy and Fee Schedule

Proposed Extra-Curricular Activity Policy

Purpose

Mountain West Montessori Academy (the “School”) believes that extra-curricular activities that are consistent with the School’s mission can provide valuable experiences that enrich the education of our students. The purpose of this policy is to establish guidelines for approving extra-curricular activities.

Policy

Only extra-curricular activities, including school clubs, approved in advance by the Director of the School shall be allowed. All extra-curricular activities must be in accordance with applicable law.

An individual or group that would like the School to establish an extra-curricular activity may present a proposal for the activity to the Director. The Director may establish procedures for the submission of proposals, but in any event, such proposals should include sufficient information about the activity and the individuals who would instruct and/or supervise such activity to enable the Director to determine whether the activity is consistent with the School’s mission, safe, and feasible. If the Director determines that it would be in the School’s best interest to sponsor the proposed activity, the Director may approve the activity.

All extra-curricular activities must comply with reasonable requirements set forth in the administrative procedures established by the Director. Parents must sign an appropriate Informed Consent form in order for a student to participate in any extra-curricular activity.

Participation in the School’s extra-curricular activities is a privilege for students. Therefore, approved extra-curricular activities will be open to all students in the applicable grades who meet the behavioral standards established by the Director. Students will not be excluded from participation in, or denied the benefits of, or be subject to discrimination under any education program or activity receiving Federal Financial Assistance in accordance with Title IX.

The School reserves the right to modify or cancel any activity at any time.

Proposed Student Fee Schedule

REQUIRED FEES (for fully and partially enrolled students)

The following student fees may be assessed to all junior high students (grades 7-9) as follows but apportioned by the number of days of school membership if a student attends less than a full school year:

2014-2015 Student Fees	
<i>Description</i>	<i>Amount</i>
Textbook Rental	\$30 <i>(w/\$5 refund for books returned in good condition)</i>
Activity and Locker Fee	\$10
9 th Grade Activity and Locker Fee	\$40
CTE fee (7 th grade only)	\$15
Entry level elective class fees	\$10
9 th Grade entry level elective fee	\$20

PRORATED FEES PAYMENT SCHEDULE

Students entering after the scheduled registration date shall pay fees using the following schedule:

Initial Date of Entry to School	Payment Rate
Prior to mid-term of term one	100%
Following mid-term of term one and prior to midterm of term two	75%
Following mid-term of term two and prior to midterm of term three	50%
Following mid-term of term three and prior to midterm of term four	25%
After mid-term of term four	No payment

REFUND OF FEES

All junior high students who withdraw from school prior to the end of the school year shall be refunded all unused fees pro rated according to the number of days attended.

Appendix I
Waiver Requests

Mountain West Montessori Academy is not seeking a waiver for any administrative rules at this time.